



Brazil Core Business Suite

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Core Business Suite

Core Business Suite (CBS) lays the foundation to unify disjointed processes. It's a collection of modules that fulfill different business needs, for different personas, within a single product suite.

https://player.vimeo.com/video/1169998761?h=6b65306fba&badge=0&autoplay=0&player_id=0%E2%80%A6

Leverage the employee support functionalities in CBS to empower your employees. You can raise the following requests and more as an employee:

- Raise a payroll or a general benefits request on HR Service Delivery.
- Raise general inquiries for workplace, legal, safety, finance, and procurement departments in your organization.

Provide suppliers in your organization an easy resolution for the following requests.

- Raise a general inquiry from the supplier catalog.
- Raise an invoice request on Accounts Payable Operations.

Choose one of these tiles to get started.

<p>Employee support</p>  <p>Learn more about the applications and features available in CBS to enable employee support system in your organization.</p>	<p>Supplier support</p>  <p>Learn more about the applications and features available in CBS to enable supplier support system in your organization.</p>
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Exploring employee support

Explore the home page for the employee requester persona along with the associated functionalities available with Core Business Suite.

Core Business Suite employee support overview

Core Business Suite application helps you set up an employee journey in your organization across departments. Raise a request with the CBS employee portal related to HR, finance, legal, procurement, and more in one place. For more information, see [Employee support areas](#).

Apart from raising requests, you can track and manage your tasks and activities with different functionalities like, My active items, My favorites, My tasks, Requests, and Org charts. For more information on each of the functionality, see [Employee Center](#) .

Core Business Suite employee users

Users

User	Description
CBS admin [sn_cbs.admin]	Manages the administrative permissions for the CBS application and has complete access to all configurations in CBS. Note: CBS admins require the sn_ia_config.ia_admin role for the overall permission to configure and manage the application.
CBS requester sn_cbs.requestor	Has permission to submit requests for different services in CBS.

Core Business Suite benefits

CBS benefits

Benefit	Feature	Users
Access Help Center to raise a request on the Employee portal in CBS.	Help Center	CBS requester [sn_cbs.requestor]
Leverage an intuitive portal navigation with the Advanced Portal Navigation (APN) in CBS. Access all your employee portal request forms under APN. Note: Merge your existing APN record with the CBS APN record or use the active and default APN setup provided in CBS. For more information on merging your existing APN record to use it in CBS, see .	Advanced Portal Navigation 	CBS requester [sn_cbs.requestor]
Provide targeted content and communication for employees in CBS.	Create campaign stages with Content Experience Builder 	CBS admin [sn_cbs.admin]
Access the employee request forms from different departments under the Help topics widget. For more information on the Help topics widget display settings, see Configure instance options for Help topics widget .	Help topics	CBS requester [sn_cbs.requestor]

CBS benefits (continued)

Benefit	Feature	Users
<ul style="list-style-type: none"> • Create quick links, associate quick links to topics, and restrict access to quick links as an admin. • Access internal and external resources related to specific departments within your organization as an employee. <p>Note: You can access any existing Quick links from your Employee Center portal, if you're already a user, on the CBS employee portal.</p>	Quick links 	<ul style="list-style-type: none"> • CBS admin [sn_cbs.admin] • CBS requester [sn_cbs.requestor]

What to explore next

To learn more about configuring and using Core Business Suite, see:

- [Using Core Business Suite](#)
- [Core Business Suite reference](#)

Employee support areas

The employee support services in the Core Business Suite help you set up a simplified employee journey in your organization.

Get started

Choose one of the following tiles to learn more about the different applications and application suites supported in Core Business Suite (CBS).

- Note:** Only case and knowledge management functionalities are supported on CBS from each of the application suites.

<p>HR Service Delivery</p>  <p>Learn more about HR Service Delivery to ensure delivery of timely employee assistance.</p> 	<p>Workplace Service Delivery</p>  <p>Learn more about Workplace Service Delivery to manage workplace-related tasks and requests in one place.</p> 	<p>Legal Service Delivery</p>  <p>Learn more about Legal Service Delivery that enables employees and legal support to manage legal requests.</p> 
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<p>Health and Safety</p>  <p>Learn more about creating safe and healthy working conditions for your employees.</p> 	<p>Finance and Supply Chain applications</p>  <p>Learn more about the finance and supply chain applications that enables employees and finance teams to manage finance-related requests.</p> 	<p>Sourcing and Procurement Operations</p>  <p>Learn more about the sourcing and procurement operations to enable your employees to shop for goods and services at work with AI-assisted tools.</p> 
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Find a breakdown of the supported features in CBS within the mentioned applications.

HR requests

General HR request



Ask general HR questions. If you have supporting documents, please attach them.

* Indicates required

* What can we help you with?

Provide as many details as possible

Add attachments



Choose a file or drag it here.
Copy and paste clipboard files here.

Raise a request for any query or issue as a general HR request on CBS. For more information, [Raise HR requests](#).

Payroll request



Get help with a paycheck issue or ask general payroll questions. If you are referencing a specific paycheck, please attach it.

* Indicates required

*What type of request is this?

Gross Wages



*What can we help you with?

Provide as many details as possible

Add attachments



[Choose a file](#) or drag it here.
Copy and paste clipboard files here.

Report an issue with your payslip as an employee. For more information, [Raise HR requests](#).

Benefits request



Ask questions about your benefits. If you have supporting documents, please attach them.

* Indicates required

*What can we help you with?

Provide as many details as possible

Add attachments



[Choose a file](#) or drag it here.
Copy and paste clipboard files here.

Ask an HR benefit questions as an employee. For more information, see [Raise HR requests](#).

Workplace requests

Workplace Services request



Get help with an outage, maintenance issue, or ask general workplace services questions.

* Indicates required

Request details

* Who is this for?

Nicholas Lopez

* Date and time requested by

YYYY-MM-DD HH:mm:ss

* Briefly, what is your request about?

Max 160 characters

What can we help you with?

Provide as many details as possible

What area needs attention?

* Building

Select a building

Floor

Select a floor

Space

Select a space

Add attachments



[Choose a file](#) or drag it here.
Copy and paste clipboard files here.

Submit a general workplace service request for issues that need human intervention.

Raise requests for issues that aren't covered by current automated workflows.

For more information on the Core Business Suite request form for workplace requests, see [Raise requests on the employee portal](#).

For more information on the Workplace Service Delivery inquiry form, if you're an existing user, see [Raise help request for a workplace inquiry](#).

Legal requests

Legal request

Ask general legal questions or request legal services.

* Indicates required

* Who is this for?

Shirley Chisholm

* Briefly, what is your request about?

Max 160 characters

* What can we help you with?

Provide as many details as possible

Add attachments



Choose a file or drag it here.
Copy and paste clipboard files here.

Submit a request to the legal department in your organization for general legal query.

For more information on the Core Business Suite request form for legal requests, see [Raise requests on the employee portal](#).

For more information on the Legal Services request form, if you're an existing user, see [Submit a legal request](#).

Health and Safety requests

Health and Safety request



Get help with risk or compliance issues or ask general health and safety questions.

* Indicates required

* Who is this for?

Susan Bell


* What type of request is this?

Health and safety procedures


* What can we help you with?

Provide as many details as possible

Add attachments



Choose a file or drag it here.
Copy and paste clipboard files here.

Ask a Health and Safety question to the safety department, and request information such as Health and Safety procedures, training, or return to work policies.

For more information on the Core Business Suite request form for Health and Safety, see [Raise requests on the employee portal](#).

For more information on the Health and Safety request form, if you're an existing user, see [Ask a Health and Safety question from Employee Center](#) .

Finance-related requests

Finance request



Ask questions or get help from the finance team

* Indicates required

* Briefly, what is your request about?

Max 160 characters

* What can we help you with?

Provide as many details as possible

Add attachments



[Choose a file](#) or drag it here.
Copy and paste clipboard files here.

Ask a general finance-related question, as an employee, targeted to the finance department in your organization. For more information, see [Submit a finance request from Employee Center catalog](#) .

Procurement requests

Procurement request

Ask questions or get help from the procurement team

* Indicates required

* What can we help you with?

Provide as many details as possible

Add attachments



[Choose a file](#) or drag it here.
Copy and paste clipboard files here.

Raise an inquiry for any pre-existing purchase, as a buyer, or any other query regarding procurement functions.

For more information on the Core Business Suite request form, see [Raise requests on the employee portal](#).

For more information on the procurement inquiry form, if you're an existing user, see [Raise a general inquiry for procurement](#) .

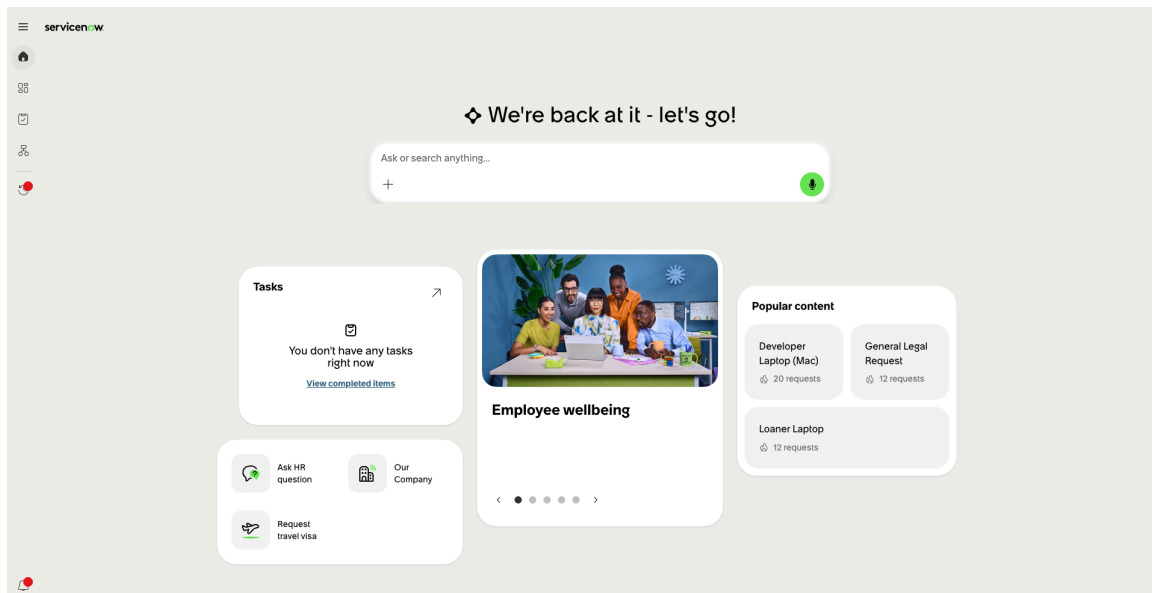
Workflows and applications

- [Employee Service Management](#) 
- [Finance and Supply Chain](#) 

Employee Slate for Core Business Suite

Employee Slate is the default employee support portal for Core Business Suite. It provides a consolidated view of Employee Center widgets with a conversational interface for raising issues, asking for information, and submitting business unit-specific service requests.

Employee Slate provides employees with a single destination to interact with CBS services. The conversational interface guides you through raising a service request using business unit-specific forms, when a question does not return a direct answer you want.



Note: Employee Slate is available Core Business Suite version 3.0.5 onwards.

Notifications on Employee Slate for CBS

The following notification types are sent to users on the Employee Slate portal.

- **New case created:** A notification is sent when a new case is created on your behalf.
- **Comments added to a case:** A notification is sent when a comment is added to one of your cases.
- **Case is awaiting acceptance:** A notification is sent when your case is awaiting your acceptance.
- **Case is closed:** A notification is sent when your case is closed.

All notifications are available in the notification center of the Employee Slate portal. If more than one notification is received simultaneously, aggregated notifications are also sent.

Business units available on Employee Slate

The following business unit support is available on the Employee Slate portal: HR, Workplace Service Delivery, Health and Safety, Legal Service Delivery, Finance Operations Management, and Sourcing and Procurement Operations.

For more information on configuring Employee Slate in CBS, see

- [Employee Slate configuration for CBS](#)
- [ServiceNow EmployeeWorks Web App](#)

Exploring supplier support

Explore the home page for the supplier requester persona along with the associated functionalities available with Core Business Suite.

Core Business Suite supplier support overview

Leverage the Supplier Collaboration Portal for the suppliers in your organization to raise a general request or an invoice request on the Core Business Suite application.

You can select the **Raise a request** button on the portal and access the request forms.

Core Business Suite supplier users

Users

User	Description
CBS admin [sn_cbs.admin]	Manages the administrative permissions for the CBS application and has complete access to all configurations in CBS. Note: CBS admins require the sn_ia_config.ia_admin role for the overall permission to configure and manage the application.
Supplier requester [sn_slm.contact]	Manually assigned to users by the admin who has access to the Supplier Collaboration Portal to raise requests on the supplier portal on CBS.

What to explore next

To learn more about configuring and using Core Business Suite, see:

- [Using Core Business Suite](#)
- [Core Business Suite reference](#)

Supplier support areas

The supplier support services in the Core Business Suite help you set up a simplified supplier journey for your organization.

Get started

Choose one of the following tiles to learn more about the different applications and application suites supported in Core Business Suite.

- Note:** Only general supplier request and invoice request are supported on CBS from the following product suites.

<p>Supplier Lifecycle Operations</p>  <p>Learn more about Supplier Lifecycle Operations to create collaboration with suppliers, mitigate risks, and monitor compliance and performance.</p> 	<p>Accounts Payable Operations</p>  <p>Learn more about Accounts Payable Operations to manage invoices, invoice exceptions, approvals, and supplier inquiries.</p> 
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Find a breakdown of the supported features in CBS within the mentioned applications.

Supplier lifecycle requests

General request

Request something or ask a general question.

* Indicates required

*Who is this for?

Ann Taylor

Supplier

*What can we help you with?

Add attachments



Choose a file or drag it here.
Copy and paste clipboard files here.

Ask a general category question, using the supplier catalog. For more information, [Raise a general supplier request](#).

Accounts Payable requests

Invoice request

Ask the Accounts Payable team questions about invoices.

* Indicates required

Supplier

Invoice number

* What type of request is this?

-- None --

* What can we help you with?

Provide as many details as possible

Add attachments



[Choose a file](#) or drag it here.
Copy and paste clipboard files here.

As a supplier, use the Supplier Collaboration Portal to create an inquiry related to an invoice and submit it to the Accounts Payable Operations team to evaluate and resolve the inquiry.

For more information, see [Raise an invoice request](#).

Workflows and applications

[Finance and Supply Chain](#) 

Configure Core Business Suite

Configure Core Business Suite to support employee and supplier requests across Human Resources, Finance, Health and Safety, Legal, Source-to-Pay, and Workplace Services.

Install Implementation agent

Install the Implementation Agent to enable a modular Admin Home dashboard for instance configuration. The Implementation Agent supports the Core Business Suite guided setup, which provides a unified experience for installing and configuring Core Business Suite applications.

Before you begin

- Note:** Core Business Suite guided setup is supported only on Zurich Patch 5 or later. Verify that your instance meets this requirement before installing the Implementation Agent.

To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Implementation agent (sn_ia) application using the filter criteria and search bar.

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

The available versions are displayed.

3. Review the available versions displayed.
4. Select a version from the list and select **Install**.

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

5. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
6. Select **Install** to start the installation process.

- Note:** When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.

You will see a message after installation is completed. For information about the components installed with a plugin, see [Find components installed with an application](#).

What to do next

Set up the Core Business Suite. For more information, see [Install Core Business Suite](#).

Activate AI Search

Activate AI Search to enable conversational search capabilities in ServiceNow Otto for Core Business Suite (CBS).

Before you begin

Role required: admin

Procedure

1. Navigate to **All > AI Search > AI Search Status**.
2. Select **Request AI Search**.

A message confirms that the AI Search activation request has been submitted.

Note: AI Search activation is processed in the background.

3. Navigate again to **All > AI Search > AI Search Status**.
When activation is complete, the status indicates that AI Search is ready.

For more information about the AI Search, see [AI Search](#).

Manage ServiceNow Otto panel

Enable the ServiceNow Otto panel to provide generative AI assistance through a conversational interface in ServiceNow Otto for Core Business Suite (CBS).

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin Center > AI Admin Center > Admin**.
2. On the **AI Admin Hub** page, go to **AI Experiences > ServiceNow Otto Panel**.
The ServiceNow Otto panel is turned on by default.
3. **Optional:** Select **Turn off** to disable it.
4. In the settings section, select **Visit Assistant Designer**.
5. On the Visit Assistant Designer page, select **Deactivate** if you want to change the default state.
The ServiceNow Otto panel is activated by default. For more information, see [ServiceNow Otto panel](#).

Install Core Business Suite

Install Core Business Suite to configure employee and supplier requests across Human Resources, Finance, Health and Safety, Legal, Workplace Services, and Source-to-Pay.

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **Set up**.
3. Under available for installation, select **Core Business Suite**.
The Application Manager opens in a new tab.
4. Select **Install**, and then follow the on-screen instructions to complete the installation.

Note: To install the latest versions, do not modify the items listed in the Review Installation Details dialog box.

Required dependent plugins are installed automatically, and required roles are added. For information about the components installed with a plugin, see [Find components installed with an application](#) .

5. Select **Apply default configurations**.

This applies the required default settings for Core Business Suite.

For information about the default configurations, see [Core Business Suite default configurations](#).

What to do next

Install the Core Business Suite applications. For more information, see .

Core Business Suite default configurations

Details of the default configurations for Core Business Suite.

These default configurations are applied automatically when Apply default configurations is selected during installation.

Core Business Suite default configurations

configuration	Description
Global settings	Configures mandatory global settings that define core Core Business Suite behavior and access.
Employee Center configuration	<p>Applies default Employee Center settings to establish the Core Business Suite user experience and navigation, including:</p> <ul style="list-style-type: none"> • Taxonomy – Structures content and topic pages within Employee Center. • Navigation – Defines how employees browse and access core services. • Home page – Configures the layout and components of the employee landing page. • Quick links – Provides shortcuts to frequently used tools and resources.
Business unit topic mapping	Configures mappings that route Employee Center requests to the appropriate business units.

Enable Core Business Suite Foundation business units

If you're using any standard business unit included in Core Business Suite Foundation, update the system properties to enable the Core Business Suite business units for installation.

Before you begin**Note:**

- If you are already using a standard business unit such as Human Resources, Finance, Health and Safety, Legal, Workplace Services, or Source-to-Pay that is included in Core Business Suite Foundation, the Core Business Suite business unit does not appear in the installation section.
- After you update the required system properties, the Core Business Suite business unit appears in the installation section.
- After you install a Core Business Suite business unit and apply the default configurations, the existing business unit customizations such as notifications and intake forms are overridden.

Role required: admin

Procedure

1. Navigate to **All > System Properties > All Properties**.

2. In the name column, search for ***cbs**.

The search lists all Core Business Suite business unit system properties records:

- `sn_cbs.override_WSD_tile`
- `sn_cbs.override_HEALTH_tile`
- `sn_cbs.override_FINANCE_tile`
- `sn_cbs.override_HR_tile`
- `sn_cbs.override_LEGAL_tile`
- `sn_cbs.override_S2P_tile`

3. Select the system property record for the required business unit.

4. In the notification bar, select **here** to edit the record in the Core Business Suite application.

5. Set the value field to **true**.

6. Select **Update**.

Result

The Core Business Suite business unit appears in the installation section.

Assign the CBS admin role

Assign the CBS Admin role to grant users full administrative access to configure Core Business Suite.

Before you begin

Verify that the user exists. If the user does not exist, create the user record first. For more information, see [Create a user](#) .

Role required: admin

Procedure

1. Navigate to **All > Organization > Users**.

2. Search for and select the user from the User column.

3. In the selected user record, select the **Roles** tab.

4. Select **Edit**.
5. In the Collection list, search for and select sn_cbs.admin.
6. Add the role to the Roles list by selecting the right arrow.
7. Select **Save**.

CBS requester role enhancements

Assigning the CBS requester role has been simplified with two approaches — automated assignment for all employees and manual setup by an administrator — giving organizations more flexibility across business units.

The CBS requester role controls which employees can access services and submit requests. Two approaches are available for assigning this role, giving organizations the flexibility to choose the method that fits their business unit structure.

The following approaches are available:

- **Automated assignment** — The CBS requester role is assigned to all employees automatically. No additional configuration is required after the initial setup.
- **Manual setup** — An administrator defines a role rule using the CBS Client Role Rule form to control which employees receive the requester role based on specific conditions.

Both approaches are configured from the Configuration Console in the Employee Experience section.

Requester role setup in the Configuration Console

Assign the CBS requester role automatically

Assign the CBS requester role to all employees at once using the automated option in the Configuration Console, so employees can access services and submit requests without manual role assignment.

Before you begin

Role required: sn_cbs.admin, admin

Procedure

1. Navigate to **Admin > Admin Home > Core Business Suite**.
2. On the Product Hub page, select **Configure** to open the Configuration Console page.

3. In the Configuration Summary section, navigate to **Employee Experience > Requester role**.
4. Select **Assign to all employees** to assign the CBS requester role to all employees.

Result

The CBS requester role is assigned to all your employees.

Assign the CBS requester role manually

Create a role rule to control which employees receive the CBS requester role, so access is granted based on conditions defined by an administrator.

Before you begin

Role required: sn_cbs.admin, admin

Procedure

1. Navigate to **Admin > Admin Home > Core Business Suite**.
2. On the Product Hub page, select **Configure** to open the Configuration Console page.
3. In the Configuration Summary section, navigate to **Employee Experience > Requester role**.
4. Select the link **Assign manually via 'CBS Client Role Rule'** to manually assign the CBS requester role.
5. On the CBS Client Role Rule form, fill in the fields and select **Submit**.
For a description of the field values, see [CBS Client Role Rule form](#).

Result

A role rule is created to determine how the CBS requester role gets assigned to your employees.

Install Core Business Suite applications

Install Core Business Suite applications to support employee and supplier requests across Human Resources, Finance, Health and Safety, Legal, Workplace Services, and Source-to-Pay.

Install Human Resources

Install Human Resources to configure its settings and requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite Foundation card, select **View product overview**.
3. On the Core Business Suite Foundation page, select **Human Resources** in the Install section.
4. Select **Install**, and then follow the on-screen instructions to complete the installation.

Note: To install the latest versions, don't modify the items listed in the Review Installation Details dialog box.

Required dependent plugins are installed automatically, and required roles are added. For information about the components installed with a plugin, see [Find components installed with an application](#).

5. Select **Apply default configurations**.

Applying default configurations sets the required default settings for the Human Resources. For information about default configurations, see [Human Resources default configurations](#).

If the default configurations aren't applied, run the script to apply them. For more information, see [Reapply the default configurations](#).

Result

The installed Human Resources business unit appears in the ready to configure section.

Human Resources default configurations

Details of the default configurations for Human Resources.

These default configurations are applied automatically when Apply default configurations is selected during installation.

Human Resources default configurations

configuration	Description
Notifications	Configures standard notifications to support Human Resources workflows and employee communication.
Record producers	Activates required record producers for submitting Human Resources requests and capturing request details.
Human Resources services	Configures required Human Resources services that define service offerings and support request routing and fulfillment.

Install Legal

Install Legal to configure its settings and requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite Foundation card, select **View product overview**.
3. On the Core Business Suite Foundation page, select **Legal** in the Install section.
4. Select **Install**, and then follow the on-screen instructions to complete the installation.

Note: To install the latest versions, don't modify the items listed in the Review Installation Details dialog box.

Required dependent plugins are installed automatically, and required roles are added. For information about the components installed with a plugin, see [Find components installed with an application](#).

5. Select **Apply default configurations**.

Applying default configurations sets the required default settings for the Legal. For information about default configurations, see [Legal default configurations](#).

If the default configurations aren't applied, run the script to apply them. For more information, see [Reapply the default configurations](#).

Result

The installed Legal business unit appears in the ready to configure section.

Legal default configurations

Details of the default configurations for Legal.

These default configurations are applied automatically when Apply default configurations is selected during installation.

Legal default configurations

configuration	Description
Notifications	Configures standard notifications to support Legal workflows and communication.
Record producers	Activates required record producers for submitting Legal requests and capturing request details.

Install Finance

Install Finance to configure its settings and requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite Foundation card, select **View product overview**.
3. On the Core Business Suite Foundation page, select **Finance** in the Install section.
4. Select **Install**, and then follow the on-screen instructions to complete the installation.

Note: To install the latest versions, don't modify the items listed in the Review Installation Details dialog box.

Required dependent plugins are installed automatically, and required roles are added. For information about the components installed with a plugin, see [Find components installed with an application](#).

5. Select **Apply default configurations**.

Applying default configurations sets the required default settings for the Finance. For information about default configurations, see [Finance default configurations](#).

If the default configurations aren't applied, run the script to apply them. For more information, see [Reapply the default configurations](#).

Result

The installed Finance business unit appears in the ready to configure section.

Finance default configurations

Details of the default configurations for Finance.

These default configurations are applied automatically when Apply default configurations is selected during installation.

Finance default configurations

configuration	Description
Notifications	Configures standard notifications to support Finance case workflows and communication.
Record producers	Activates required record producers for submitting Finance requests and capturing case details.

Install Health and Safety

Install Health and Safety to configure its settings and requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite Foundation card, select **View product overview**.
3. On the Core Business Suite Foundation page, select **Health and Safety** in the Install section.
4. Select **Install**, and then follow the on-screen instructions to complete the installation.

Note: To install the latest versions, don't modify the items listed in the Review Installation Details dialog box.

Required dependent plugins are installed automatically, and required roles are added. For information about the components installed with a plugin, see [Find components installed with an application](#).

5. Select **Apply default configurations**.

Applying default configurations sets the required default settings for the Health and Safety. For information about default configurations, see [Health and Safety default configurations](#).

If the default configurations aren't applied, run the script to apply them. For more information, see [Reapply the default configurations](#).

Result

The installed Health and Safety business unit appears in the ready to configure section.

Health and Safety default configurations

Details of the default configurations for Health and Safety.

These default configurations are applied automatically when Apply default configurations is selected during installation.

Health and Safety default configurations

configuration	Description
Notifications	Configures standard notifications to support Health and Safety workflows and communication.
Record producers	Activates required record producers for submitting Health and Safety requests and capturing case details.

Install Workplace Services

Install Workplace Services to configure its settings and requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite Foundation card, select **View product overview**.
3. On the Core Business Suite Foundation page, select **Workplace Services** in the Install section.
4. Select **Install**, and then follow the on-screen instructions to complete the installation.

Note: To install the latest versions, don't modify the items listed in the Review Installation Details dialog box.

Required dependent plugins are installed automatically, and required roles are added. For information about the components installed with a plugin, see [Find components installed with an application](#).

5. Select **Apply default configurations**.

Applying default configurations sets the required default settings for the Workplace Services. For information about default configurations, see [Workplace Services default configurations](#).

If the default configurations aren't applied, run the script to apply them. For more information, see [Reapply the default configurations](#).

Result

The installed Workplace Services business unit appears in the ready to configure section.

Workplace Services default configurations

Details of the default configurations for Workplace Services.

These default configurations are applied automatically when Apply default configurations is selected during installation.

Workplace Services default configurations

configuration	Description
Notifications	Configures standard notifications to support Workplace Services workflows and communication.
Record producers	Activates required record producers for submitting Workplace Services requests and capturing case details.
Workplace services	Configures required Workplace Services that support request handling and fulfillment.

Install Source-to-Pay

Install Source-to-Pay to configure its settings and requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite Foundation card, select **View product overview**.
3. On the Core Business Suite Foundation page, select **Source-to-Pay** in the Install section.
4. Select **Install**, and then follow the on-screen instructions to complete the installation.

Note: To install the latest versions, don't modify the items listed in the Review Installation Details dialog box.

Required dependent plugins are installed automatically, and required roles are added. For information about the components installed with a plugin, see [Find components installed with an application](#).

5. Select **Apply default configurations**.

Applying default configurations sets the required default settings for the Source-to-Pay. For information about default configurations, see [Source-to-Pay default configurations](#).

If the default configurations aren't applied, run the script to apply them. For more information, see [Reapply the default configurations](#).

Result

The installed Source-to-Pay business unit appears in the ready to configure section.

Source-to-Pay default configurations

Details of the default configurations for Source-to-Pay.

These default configurations are applied automatically when Apply default configurations is selected during installation.

Source-to-Pay default configurations

configuration	Description
Notifications	Configures standard notifications to support Source-to-Pay workflows and communication.
Record producers	Activates required record producers for submitting supplier, procurement, and invoice-related requests and capturing request details.
Supplier collaboration	Configures supporting settings that enable collaboration between internal users and suppliers.

Reapply the default configurations

If the default configurations aren't applied for Core Business Suite or its business units, reapply the default configurations by running a script.

Before you begin

Note: When the default configurations aren't applied, the following message appears:

Installation succeeded, but some default configurations couldn't be applied. Review and complete the remaining steps in configuration.

Role required: admin

Procedure

1. Navigate to **All > System Definition > Script - Background**.

The run script page opens.

2. Copy this script and paste it into the script editor.

```
var driverScript = new sn_cbs.CBSDriver();
var result = driverScript.onBUTrigger("placeholder");
gs.info(JSON.stringify(result, null, 2));
```

3. Replace `placeholder` with the appropriate business unit name.

Note: Use only the supported business unit names when replacing the text placeholder. Using an incorrect name can cause the script to fail.

Business unit names are: CBS, WSD, LEGAL, HR, S2P, HEALTH, FCM.

4. Select **Run Script**.

After the script completes, the script-completed page displays the execution logs followed by a success message.

Assign the CBS Requestor role

Assign the CBS requestor role to enable users to access services and submit requests through Employee Center.

Before you begin

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. From the Configuration Summary navigation menu, select **Requestor role** under Requester experience.
5. Select **Requestor role configuration**.

Note: The CBS Requestor role is preassigned to the CBS Requestors group.

6. To add an existing user group:
 - a. In the Parent field, Search for and select the existing group.
 - b. Select **Update**.
7. To add users to the group:
 - a. Under the Group Members tab, select **New**.
 - b. On the form, fill in the fields.

User - New record form

Field	Description
User ID	Unique identifier for the user.

Field	Description
First name	First name of the user.
Last name	Last name of the user.
Title	Job title of the user.
Department	Department the user belongs to.
Password needs reset	Select to require the user to reset their password at next login.
Locked out	Indicates whether the user account is locked out.
Active	Select to activate the user account. Selected by default.
Identity type	Type of identity assigned to the user. Default value is Human.
Internal Integration User	Select if the user is an internal integration account and not a human user.
Email	Email address of the user.
Language	Preferred language for the user interface.
Calendar integration	Calendar application integrated with the user account. Default value is Outlook.
Time zone	Time zone for the user. Default value is the system time zone.
Date format	Date display format for the user. Default value is the system date format.
Business phone	Business phone number of the user.
Mobile phone	Mobile phone number of the user.
Photo	Profile photo of the user.

c. Select **Submit**.

8. On the Manage requestor role page, select **Mark as configured**.

Set assignment rules in CBS

Configure assignment rules for each business unit in Core Business Suite to control how tasks are automatically assigned to groups or users based on defined conditions.

Before you begin

Role required: sn_cbs.admin

About this task

Assignment rules are available by default for all business units. The default setting is inactive. Mark the default configuration as **Active** for the business units you require.

Procedure

1. Navigate to **Admin Home > Core Business Suite** and select **Configure** on the Product Hub page.
2. In the **Configuration Summary** section, go to the **Assignment Rules** section of the business unit you want to configure, such as Human Resources.
3. **Optional:** In the **Active** list, set the default assignment rules you plan to use for that business unit to **true**.
4. **Optional:** Select a default assignment rule to open and edit it.
5. **Optional:** On the Edit assignment rule form, fill in the fields and select **Save**.

(Optional) For a description of the field values, see [Assignment rule form](#).

6. **Optional:** On the Assignment Rules page, select **Add New** to create a custom rule.

Result

Assignment rules are configured for the required business units in CBS.

Configure instance options for Help topics widget

Configure the instance options for the Help topics widget on the CBS employee portal according to your organizational requirement.

Before you begin

Role required: sn_cbs.admin

Procedure

1. Navigate to **Employee Center > Help topics**.
2. Press **Control** and select and hold (or right-click) on the Help topics widget to view the Instance options and select it.
3. In the Instance form, fill in the fields, and select **Save**.
For a description of the field values, see [Help topics instance options](#).

Core Business Suite setup on Product Hub

Core Business Suite (CBS) is available in three subscription tiers. Depending on your subscription, you can set up your application on the Product Hub.

Core Business Suite is available in the following subscription tiers:

- Core Business Suite Foundation
- Core Business Suite Advanced
- Core Business Suite Prime

Depending on your subscription, you can set up your CBS application directly from the Product Hub. Check your entitlements to determine whether you have access to the tier that meets your needs.

For more details, see [Configure CBS on Product Hub](#).

Configure CBS on Product Hub

Install your Core Business Suite subscription from the Product Hub to set up the application on your instance.

Before you begin

Role required: admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. In the Manage your products section, select **Core Business Suite** and select **Start new setup**.
3. On the Product Hub page, select the hyperlink on your Core Business Suite subscription card to install it.
4. In the Application Manager page, select **Install** for your entitled subscription.

Note:

- The pop-up message **Now you're ready to configure** displays when the application is successfully installed. You can go ahead and start configuring your individual business units.
- Core Business Suite Foundation displays a **Configure** button after installation because it requires further setup in the Configuration Console. This button is not present in Core Business Suite Advanced or Core Business Suite Prime.
- Core Business Suite Advanced 3.0.5 and Core Business Suite Prime 3.0.5 are only available on the Product Hub for installations. Use the Configuration Console for the business unit-specific configurations.

Result

You have installed your Core Business Suite subscription from the Product Hub.

What to do next

Set up the application on the Configuration Console as required. For more information, see

- [Configure Core Business Suite using guided setup](#)
- [Configure Core Business Suite using Otto](#)
- [Employee Slate configuration for CBS](#)

Employee Slate configuration for CBS

Core Business Suite provides two setup options for configuring Employee Slate as the default employee support portal. You can select any one according to your organizational requirement.

Starting with Core Business Suite Foundation version 3.0.5, Employee Slate is the default employee support portal.

The Employee Slate setup options are as follows:

- Employee Slate for Moveworks
- Employee Slate for Now Assist

Note:

Employee Slate for Moveworks is the recommended path as is mentioned in your instance in terms of overall capabilities. Only in situations where Employee Slate for Moveworks is not available, should you select the Employee Slate for Now Assist option.

If you configure both Employee Slate for Moveworks and Employee Slate for Now Assist, both options appear, each linking to its **Configuration Console**. The following table describes both options.

Employee Slate setup options

Option	Details
Employee Slate for Moveworks	<p>An AI-enabled employee portal paired with the Moveworks conversational assistant. Provides a chat-first experience across the portal with broad self-service coverage.</p> <ul style="list-style-type: none"> • Use case: Organizations standardizing on a single AI assistant across channels. • Result: Personalized guidance per role across self-service interactions. • Prerequisites: Active Moveworks contract and integration setup.
Employee Slate for Now Assist	<p>An AI-native employee portal with Now Assist. A fully native path with no external dependency.</p> <ul style="list-style-type: none"> • Use case: Organizations with no access to Moveworks. • Result: AI-assisted self-service across the employee portal with no external integration. • Prerequisites: Active Now Assist entitlement; no Moveworks contract or integration setup available.

To set up any option, install the application and set it up in your Configuration Console.

Configure Employee Slate for Moveworks

Configure Employee Slate for Moveworks to provide a conversational interface for employee portal queries on CBS. Use the Configuration Summary page to complete setup across five sections and export the finished configuration.

Before you begin

Role required: sn_cbs.admin

About this task

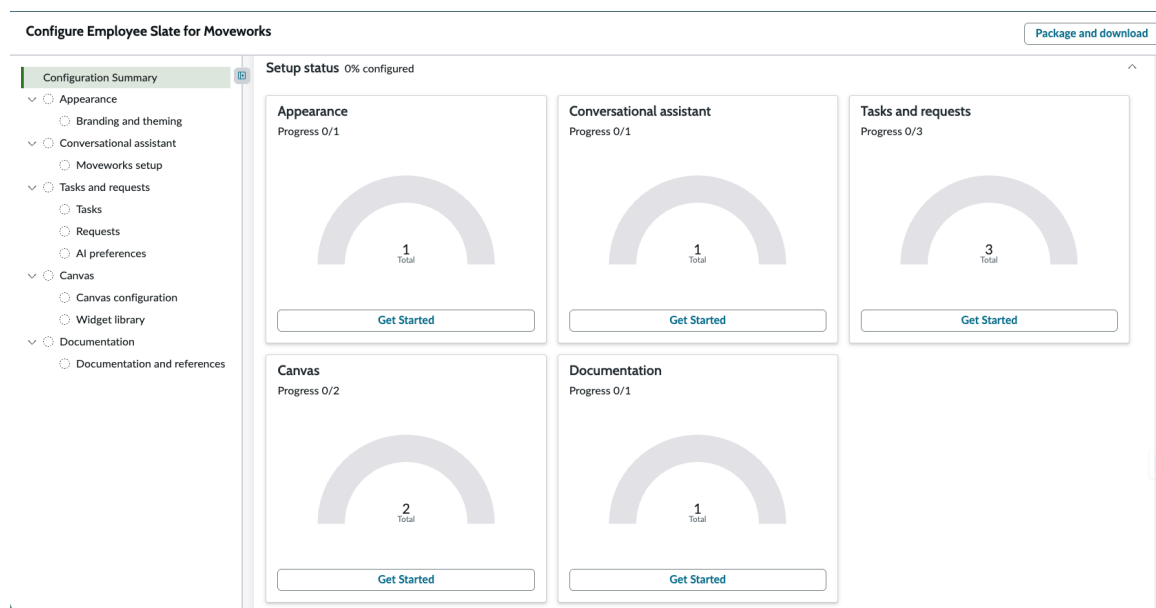
Set up the Employee Slate for Moveworks portal to get a conversational interface for all your employee portal-related queries on CBS.

The Configuration Summary page tracks setup progress across five sections: **Appearance**, **Conversational assistant**, **Tasks and requests**, **Canvas**, and **Documentation**. Each section displays its completion status and total number of configuration items. Complete all sections to finish the setup.

Procedure

1. Navigate to **Admin > Admin Home > Core Business Suite > .**
2. Select **Core Business Suite** card, and select **Configure**.
3. In the Configure your product section, go to **Employee Experience**, and select **Get Started**.
4. In the Employee Slate list, select **Employee Slate for Moveworks** to open it in **Product Hub**, and select **Start new setup**.
5. In the Application Manager page, select **Install**.
It provides a pop-message when the installation is complete and **Employee Slate for Moveworks** is ready to configure.
6. In the Configuration console, select each section to set up **Employee Slate for Moveworks**.

The Configuration Console page opens, showing the overall setup status and a card for each configuration section. The setup status displays the percentage of sections completed.



7. On the Configuration Summary menu follow through the steps.
For a description of the field values, see [Employee Slate for Moveworks configuration menu](#).
8. Select **Mark as configured** after finishing configuration of each section.

Result

After all sections are complete, the setup status on the Configuration Summary page shows 100% configured. Select **Package and download** to export the configuration.

Configure Employee Slate for Now Assist

Configure Employee Slate for Now Assist to provide a conversational interface for employee portal queries on CBS. Use the Configuration Summary page to complete setup across six sections and export the finished configuration.

Before you begin

Role required: sn_cbs.admin

About this task

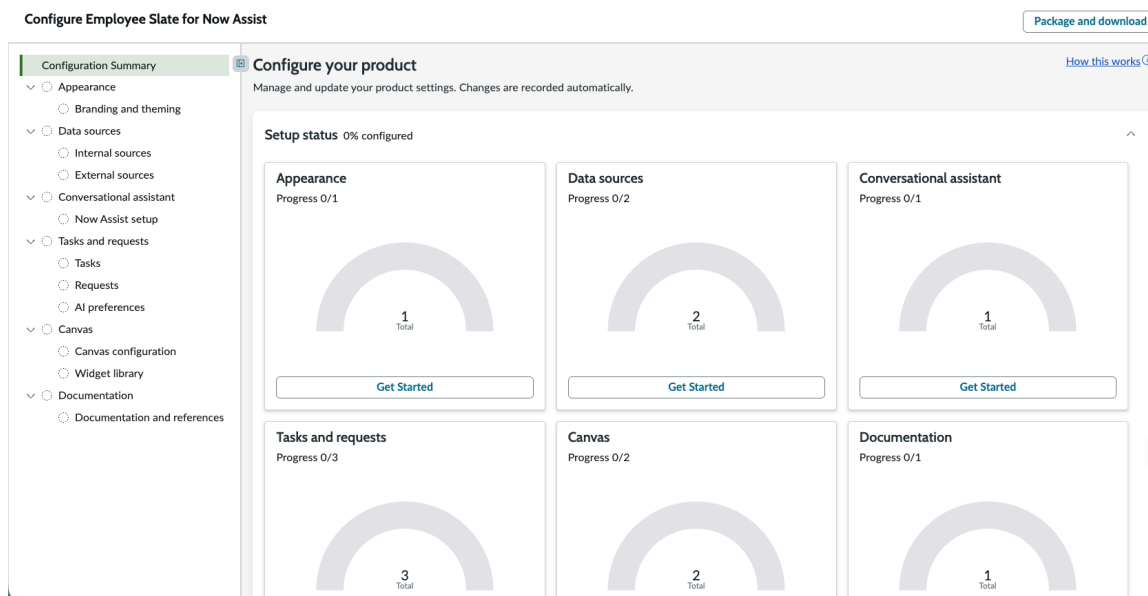
Set up Employee Slate for Now Assist to get a conversational interface for all your employee portal-related queries on CBS.

The Configuration Summary page tracks setup progress across six sections: **Appearance**, **Data sources**, **Conversational assistant**, **Tasks and requests**, **Canvas**, and **Documentation**. Each section displays its completion status and total number of configuration items. Complete all sections to finish the setup.

Procedure

1. Navigate to **Admin > Admin Home > Core Business Suite > .**
2. Select **Core Business Suite** card, and select **Configure**.
3. In the Configure your product section, go to **Employee Experience**, and select **Get Started**.
4. In the Employee Slate list, select **Employee Slate for Now Assist** to open it in **Product Hub**, and select **Start new setup**.
5. In the Application Manager page, select **Install**.
It provides a pop-message when the installation is complete and **Employee Slate for Now Assist** is ready to configure.
6. In the Configuration console, select each section to set up **Employee Slate for Now Assist**.

The Configuration Console page opens, showing the overall setup status and a card for each configuration section. The setup status displays the percentage of sections completed.



7. On the Configuration Summary menu follow through the steps.
For a description of the field values, see [Employee Slate for Now Assist configuration menu](#).
8. Select **Mark as configured** after finishing configuration of each section.

Result

After all sections are complete, the setup status on the Configuration Summary page shows 100% configured. Select **Package and download** to export the configuration.

Configure Core Business Suite using guided setup

Configure Core Business Suite business units using guided setup in the Configuration Console.

Configure Human Resources

Configure the Human Resources (HR) business unit to manage payroll inquiries, benefits questions, and general HR requests.

Before you begin

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. From the Configuration Summary navigation menu, select **Human Resources**.

Alternatively, select **Continue** on the Human Resources tile.

Configure the followings settings as needed:

- Intake forms (preconfigured by default)
- Manage Groups
- Role assignment
- Email address
- Notifications (preconfigured by default)

Note: By default, the CBS admin role cannot configure Manage Groups or Role assignment. To complete these tasks, assign the User admin role (user_admin) to the CBS admin (sn_cbs.admin).

for more information, see .

5. Customize existing intake forms or create new ones to collect HR requests.

The following intake forms are preconfigured by default:

Intake form

Intake form	Description
General HR request	Submit general Human Resources questions.
Payroll request	Get help with payroll-related issues.
Benefits request	Ask questions about employee benefits.

- To customize an existing intake forms, select the **Edit** icon.
- To create a intake form, select **Create new**. For more information, see [Catalog Builder](#) .

Note: Create intake forms directly in the production instance. Intake forms created in sub-production instances are not supported for promotion to production.

6. Manage groups to organize users who handle HR requests, manage knowledge, and configure access.

- Human Resources default groups

The following groups are preconfigured with associated roles:

Human Resources default groups

Human Resources group	Description
HR Request Handlers	Receive, assign, and respond to HR requests.
HR Administrators	Manage HR roles, oversee processes, and access HR tools.
Employee Center Managers	Manage support topics, quick links, and knowledge articles.

To assign users to a default group:

- Select the **Edit** icon next to the group name.
- In the Assign people to this group field, search for and select users.
- Select **Save**.

Note: Users added to a default group are automatically assigned the roles listed under Default assigned role.

- Create custom groups to organize HR team.

- Select **Create Group**.
- On the form, fill in the fields.

Create Group form

Field	Description
Group name	Name used to identify the group within the business unit.
Group manager	User responsible for managing the group.
Group description	Brief description of the group's purpose.
Assign people to this group	Users to add as group members.
Assign role	Roles assigned to group members.

- Select **Save**.

7. Assign roles to give groups the required access.

- Select a role.
- Select **Assign groups**.
- Select the group from the list.
- Select **Update**.

8. Configure Human Resources email address by adding the email address and select **Save**. Emails sent to this address automatically create requests and send the request number to the sender.

9. Configure notifications sent through Email, Portal, and Workspace to users about submitted or assigned requests.

- To create an email notifications, see [Create an email notification](#).
- To create Portal or Workspace notifications, see [Trigger conditions form](#).

10. After you finish all configuration steps, select **Mark as configured**.

Configure Legal

Configure the Legal business unit to submit and manage legal requests.

Before you begin

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. From the Configuration Summary navigation menu, select **Legal**.

Alternatively, select **Continue** on the Legal tile.

Configure the following settings as needed:

- Intake forms (preconfigured by default)
- Manage Groups
- Role assignment
- Notifications (preconfigured by default)

Note: By default, the CBS admin role cannot configure Manage Groups or Role assignment. To complete these tasks, assign the User admin role (user_admin) to the CBS admin (sn_cbs.admin).

for more information, see .

5. Customize existing intake form or create new ones to collect legal requests.

The following intake form is preconfigured by default:

Intake form

Intake form	Description
Legal request	Submits general legal questions or requests legal services.

- To customize an existing intake form, select the **Edit** icon.
- To create a intake form, select **Create new**.

For more information, see [Catalog Builder](#).

Note: Create intake forms directly in the production instance. Intake forms created in sub-production instances are not supported for promotion to production.

6. Manage groups to organize users who handle legal requests, manage content, and configure access.

- Legal default groups

The following groups are preconfigured with associated roles:

Legal default groups

Legal groups	Description
Legal Administrators	Manage Legal roles, processes, and workflows.
Legal Employee center managers	Manage Legal support topics, quick links, and knowledge articles in the Employee Center.
Legal Request managers	Receive, assign, and respond to Legal requests.

To assign user to a default group:

- Select the **Edit** icon next to the group name.
- In the Assign people to this group field, search for and select users.
- Select **Save**.

Note: Users added to a default group are automatically assigned the roles listed under Default assigned role.

- Create custom groups to organize your Legal team.

- Select **Create Group**.
- On the form, fill in the fields.

Create Group form

Field	Description
Group name	Name used to identify the group within the business unit.
Group manager	User responsible for managing the group.
Group description	Brief description of the group's purpose.
Assign people to this group	Users to add as group members.
Assign role	Roles assigned to group members.

- Select **Save**.

7. Assign roles to give groups the required access.

- Select a role.
- Select **Assign groups**.
- Select the group from the list.
- Select **Update**.

8. Configure notifications sent through Email, Portal, and Workspace to users about submitted or assigned legal requests.

- To create an email notifications, see [Create an email notification](#) .
- To create Portal or Workspace notifications, see [Trigger conditions form](#) .

9. After you finish all configuration steps, select **Mark as configured**.

Configure Finance

Configure the Finance business unit to enable employees to submit and manage finance-related requests.

Before you begin

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. From the Configuration Summary navigation menu, select **Finance**.

Alternatively, select **Continue** on the Finance tile.

Configure the following settings as needed:

- Intake forms (preconfigured by default)
- Manage Groups
- Role assignment
- Notifications (preconfigured by default)

 **Note:** By default, the CBS admin role cannot configure Manage Groups or Role assignment. To complete these tasks, assign the User admin role (user_admin) to the CBS admin (sn_cbs.admin).

for more information, see .

5. Customize existing intake form or create new ones to collect finance requests.

The following intake form is preconfigured by default:

Intake form

Intake form	Description
General finance request	Submit general finance questions or request finance services.

- To customize an existing intake form, select the **Edit** icon.
- To create a intake form, select **Create new**. For more information, see [Catalog Builder](#) .

 **Note:** Create intake forms directly in the production instance. Intake forms created in sub-production instances are not supported for promotion to production.

6. Manage groups to organize users who handle finance requests and configure access.

- Finance default groups

The following groups are preconfigured with associated roles:

Finance default groups

Finance groups	Description
Finance Request handlers	Receive, assign, and respond to Finance requests.
Finance Administrators	Manage Finance roles, processes, and tools.

To assign users to a default group:

- Select **Edit** icon next to the group name.
- In the Assign people to this group field, search for and select users.
- Select **Save**.

Note: Users added to a default group are automatically assigned the roles listed under Default assigned role.

- Create custom groups to organize your Finance team.

- Select **Create Group**.
- On the form, fill in the fields.

Create Group form

Field	Description
Group name	Name used to identify the group within the business unit.
Group manager	User responsible for managing the group.
Group description	Brief description of the group's purpose.
Assign people to this group	Users to add as group members.
Assign role	Roles assigned to group members.

- Select **Save**.

7. Assign roles to give groups the required access.

- Select a role.
- Select **Assign groups**.
- Select the group from the list.
- Select **Update**.

8. Configure notifications sent through Email, Portal, and Workspace to users about submitted or assigned finance requests.

- To create an email notifications, see [Create an email notification](#).
- To create Portal or Workspace notifications, see [Trigger conditions form](#).

9. After you finish all configuration steps, select **Mark as configured**.

Configure Health and Safety

Configure the Health and Safety business unit to enable employees to submit and manage health and safety-related requests.

Before you begin

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. From the Configuration Summary navigation menu, select **Health and Safety**.

Alternatively, select **Continue** on the Health and Safety tile.

Configure the following settings as needed:

- Intake forms (preconfigured by default)
- Manage Groups
- Role assignment
- Notifications (preconfigured by default)

Note: By default, the CBS admin role cannot configure Manage Groups or Role assignment. To complete these tasks, assign the User admin role (user_admin) to the CBS admin (sn_cbs.admin).

for more information, see .

5. Customize existing intake form or create new ones to collect Health and Safety requests.

The following intake form is preconfigured by default:

Intake form

Intake form	Description
Health and Safety request	Get help with risk or compliance issues or submit general health and safety questions.

- To customize an existing intake form, select the **Edit** icon.
- To create a intake form, select **Create new**. For more information, see [Catalog Builder](#) .

Note: Create intake forms directly in the production instance. Intake forms created in sub-production instances are not supported for promotion to production.

6. Manage groups to organize users who handle health and safety requests, manage content, and configure access.

- Health and Safety default groups

The following groups are preconfigured with associated roles:

Health and Safety default groups

Health and Safety groups	Description
Health and Safety Request Handlers	Receive, assign, and respond to Health and Safety requests.
Health and Safety Administrators	Manage Health and Safety roles, processes, and tools.
Health and Safety Employee center managers	Manage support topics, quick links, and knowledge articles in the Employee Center.

To assign users to a default group:

- a. Select **Edit** icon next to the group name.
- b. In the Assign people to this group field, search for and select users.
- c. Select **Save**.

Note: Users added to a default group are automatically assigned the roles listed under Default assigned role.

- Create custom groups to organize your Health and Safety team.

- a. Select **Create Group**.
- b. On the form, fill in the fields.

Create Group form

Field	Description
Group name	Name used to identify the group within the business unit.
Group manager	User responsible for managing the group.
Group description	Brief description of the group's purpose.
Assign people to this group	Users to add as group members.
Assign role	Roles assigned to group members.

- c. Select **Save**.

7. Assign roles to give groups the required access.

- a. Select a role.
- b. Select **Assign groups**.
- c. Select the group from the list.
- d. Select **Update**.

8. Configure notifications sent through Email, Portal, and Workspace to users about submitted or assigned Health and Safety requests.

- To create an email notifications, see [Create an email notification](#).
- To create Portal or Workspace notifications, see [Trigger conditions form](#).

9. After you finish all configuration steps, select **Mark as configured**.

Configure Workplace Services

Configure the Workplace Services business unit to manage workplace service requests and space arrangements.

Before you begin

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. From the Configuration Summary navigation menu, select **Workplace Services**.

Alternatively, select **Continue** on the Workplace Services tile.

Configure the followings as needed:

- Intake forms (preconfigured by default)
- Manage Groups
- Role assignment
- Email address
- Workplace locations
- Notifications (preconfigured by default)

Note: By default, the CBS admin role cannot configure Manage Groups or Role assignment. To complete these tasks, assign the User admin role (user_admin) to the CBS admin (sn_cbs.admin).

for more information, see .

5. Customize existing intake form or create new ones to collect workplace requests.

The following intake form is preconfigured by default:

Intake form

Intake form	Description
Workplace Services request	Report outages, maintenance issues, or submit general workplace services questions.

- To customize an existing intake form, select the **Edit** icon.
- To create a intake form, select **Create new**. For more information, see [Catalog Builder](#) .

Note: Create intake forms directly in the production instance. Intake forms created in sub-production instances are not supported for promotion to production.

6. Manage groups to organize users who handle workplace requests, manage content, and configure access.

- Workplace Services default groups

The following groups are preconfigured with associated roles:

Workplace Services default groups

Workplace Services groups	Description
WSD Administrators	Manage Workplace Services roles, processes, and workflows.
WSD Employee center managers	Manage Workplace Services support topics, quick links, and knowledge articles in the Employee Center.
WSD Request managers	Receive, assign, and respond to Workplace Services requests.

To assign users to a default group:

- Select **Edit** icon next to the group name.
- In the Assign people to this group field, search for and select users.
- Select **Save**.

i Note: Users added to a default group are automatically assigned the roles listed under Default assigned role.

- Create custom groups to organize your Workplace Services team.

- Select **Create Group**.
- On the form, fill in the fields.

Create Group form

Field	Description
Group name	Name used to identify the group within the business unit.
Group manager	User responsible for managing the group.
Group description	Brief description of the group's purpose.
Assign people to this group	Users to add as group members.
Assign role	Roles assigned to group members.

- Select **Save**.

7. Assign roles to give groups the required access.

- Select a role.
- Select **Assign groups**.
- Select the group from the list.
- Select **Update**.

8. Configure the Workplace Services email address and select **Save**.

Emails sent to this address automatically create requests and send the request number to the sender.

9. Manage your work spaces by adding space details or by uploading a template file.

- Add spaces:

- a. Select **Add spaces**.

- b. On the form, fill in the fields.

New space form

Field	Description
Region	Geographic region of the space.
Site	Site name, such as a city or campus.
Campus	Campus associated with the site.
Building	Building where the space is located.
Floor	Floor number or identifier.
Space name	Name of the space, such as a meeting room.
Space type	Type of space, such as office or conference room.
Time zone	Time zone for accurate scheduling.

- c. Select **Save**.

Note: To add multiple spaces, select **+ New Space** and repeat the steps.

- Bulk upload:

- a. Select **Upload spaces**.

- b. Download the space template.

- c. Enter space details in the template.

- d. Save the file in .xlsx or .xls format.

- e. Upload the updated file.

- f. Select **Complete upload**.

Note: Ensure all required fields are completed and the file size does not exceed 50 MB.

- Bulk edit:

- a. From the more options menu (three dots), select **Bulk edit spaces**.

- b. Download the file and update the space details.

- c. Save the file in .xlsx or .xls format.

- d. Upload the updated file.

- e. Select **Complete upload**.

Note: Ensure all changes are accurate before uploading.

10. Configure notifications sent through Email, Portal, and Workspace to users about submitted or assigned workplace requests.

- To create an email notifications, see [Create an email notification](#) .
- To create new Portal or Workspace notifications, see [Trigger conditions form](#) .

11. After you finish all configuration steps, select **Mark as configured**.

Configure Source-to-Pay

Configure the Source-to-Pay business unit to manage procurement, supplier, and invoice requests from submission to fulfillment.

Before you begin

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. From the Configuration Summary navigation menu, select **Source-to-Pay**.

Alternatively, select **Continue** on the Source-to-Pay tile.

Configure the following settings as needed:

- Intake forms (preconfigured by default)
- Manage Groups
- Role assignment
- Supplier management
- Supplier contacts
- Email address
- Notifications (preconfigured by default)

Note: By default, the CBS admin role cannot configure Manage Groups or Role assignment. To complete these tasks, assign the User admin role (user_admin) to the CBS admin (sn_cbs.admin).

for more information, see .

5. Customize existing intake forms or create new ones to collect Source#to#Pay requests.

The following intake forms are preconfigured by default:

Intake form

Intake form	Description
General supplier request	Submit general questions related to suppliers.
Procurement request	Submit procurement#related questions or requests.
Invoice request	Submit invoice#related questions to Accounts Payable.

- To customize an existing intake form, select the **Edit** icon.
- To create a intake form, select **Create new**. For more information, see [Catalog Builder](#) .

Note: Create intake forms directly in the production instance. Intake forms created in sub-production instances are not supported for promotion to production.

6. Manage groups to organize users who handle Source#to#Pay requests and configure access.

- Source-to-Pay default groups

The following groups are preconfigured with associated roles:

Source-to-Pay default groups

Source-to-Pay groups	Description
Accounts payable admins	Manage Accounts Payable roles, processes, and workflows.
Procurement admins	Manage Procurement roles, processes, and workflows.
Supplier operations admins	Manage supplier operations roles and supplier management activities.
S2P Employee center managers	Manage Source#to#Pay content in the Employee Center.
Invoice Request managers	Receive, assign, and respond to invoice requests.
Procurement Request managers	Receive, assign, and respond to procurement requests.
Supplier Request managers	Receive, assign, and respond to supplier requests.

To assign user to a default group:

- Select **Edit** icon next to the group name.
- In the Assign people to this group field, search for and select users.
- Select **Save**.

Note: Users added to a default group are automatically assigned the roles listed under Default assigned role.

- Create custom groups to organize your Source-to-Pay team.

- Select **Create Group**.
- On the form, fill in the fields.

Create Group form

Field	Description
Group name	Name used to identify the group within the business unit.
Group manager	User responsible for managing the group.
Group description	Brief description of the group's purpose.
Assign people to this group	Users to add as group members.

Field	Description
Assign role	Roles assigned to group members.

c. Select **Save**.

7. Assign roles to give groups the required access.

a. Select a role.

b. Select **Assign groups**.

c. Select the group from the list.

d. Select **Update**.

8. Configure the Source#to#Pay email address and select **Save**.

Emails sent to this address automatically create requests and send the request number to the sender.

9. Supplier management

Manage suppliers by adding supplier details or by uploading a template.

o Add suppliers:

a. Select **Add suppliers**.

b. On the form, fill in the fields.

Add supplier form

Field	Description
Legal name	Legal name of the supplier.
Country of registration	Country where the supplier is registered.
Website	Supplier's official website.
DUNS number	DUNS identifier for the supplier.
Description	Short description of the supplier.
ERP company code	Unique ERP company code. If no code exists, assign a unique code for each record (for example, 100, 101, 102)
ERP source	ERP source for the supplier. If no source is available, select CBS.
Active	Indicates whether the supplier is active.

c. Select **Save**.

 **Note:** To add multiple suppliers, select **+ New supplier** and repeat the steps.

o Bulk upload:

a. Select **Upload suppliers**.

b. Download the supplier template.

- c. Enter the supplier details in the template.
- d. Save the file in .xlsx or .xls format.
- e. Upload the updated file.
- f. Select **Complete upload**.

Note: Ensure all required fields are completed and the file size does not exceed 50 MB.

10. Add or upload contacts associated with each supplier.

Add contacts:

- a. Select **Add contacts**.
- b. On the form, fill in the fields.

Add contacts form

Field	Description
First name	First name of the contact.
Last name	Last name of the contact.
Email	Email address of the contact.
Is this primary contact	Designates the primary contact. Default is Yes.
Organisation (Supplier)	Supplier associated with the contact.

Note: You can add up to 10 contacts at a time by selecting **+ New contact**.

Bulk upload:

- a. Select **Upload contacts**.
- b. Download the template.
- c. Update the contact details.
- d. Upload the updated template.
- e. Select **Save**.

Note: Ensure all fields are complete and accurate before uploading.

11. Configure notifications sent through Email, Portal, and Workspace to users about submitted or assigned Source#to#Pay requests.

- To create an email notifications, see [Create an email notification](#).
- To create Portal or Workspace notifications, see [Trigger conditions form](#).

12. After you finish all configuration steps, select **Mark as configured**.

Configure Core Business Suite using Otto

Configure Core Business Suite using a conversational interface provided by Now Assist.

ServiceNow Otto for Core Business Suite (CBS)

Now Assist for Core Business Suite supports Core Business Suite configuration through a conversational experience. Now Assist guides administrators through setup steps, tracks configuration progress, suggests next actions, and helps resolve errors from a single chat experience.

ServiceNow Otto for Core Business Suite (CBS) overview

Now Assist for Core Business Suite provides a conversational interface using Virtual Agent to support the Core Business Suite simplified setup process. Administrators can use Now Assist to initiate setup actions, review configuration progress, and access setup-related information.

Now Assist maintains context across setup steps and reflects the current system state. It uses AI agents, skills, and tools to guide configuration activities through a structured conversational flow.

ServiceNow Otto for Core Business Suite (CBS) conversational flow

Now Assist for Core Business Suite provides a conversational experience using Virtual Agent to configure and manage Core Business Suite. Administrators can start the setup, review available configuration topics, and ask setup-related questions using natural language.

AI Skills

The following AI skills are available in ServiceNow Otto for Core Business Suite (CBS):

- **Setup Progress Summary:** Provides visibility into the current state of Core Business Suite installation and configuration by summarizing completed steps and pending tasks. This helps administrators track setup progress without reviewing individual configuration areas.
- **Next Best Action:** Identifies the next setup task based on the current configuration state. Recommendations update as the setup progresses and additional configuration steps become available.
- **Error Resolution:** Provides contextual guidance when an installation or configuration step does not complete successfully. The skill suggests possible actions to address common setup issues and continue the setup process.

AI capabilities

The following generative AI capabilities are available in ServiceNow Otto for Core Business Suite (CBS):

- **Conversational Setup Guidance:** Guides administrators through Core Business Suite business unit setup steps in sequence using a conversational interface in the Now Assist panel.
- **Contextual Awareness:** Maintains awareness of completed setup steps and installed business units, allowing administrators to continue configuration from the current setup state.
- **Dynamic Recommendations:** Suggests next setup steps and highlights missing configurations based on the current setup state as setup progresses.
- **Multi-Business Unit Support:** Supports configuring multiple business units from a single guided setup flow in the Configuration Console.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there

is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by [ServiceNow's AI Acceptable Use Policy](#), which may be updated by ServiceNow.

Data processing

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

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect data about workplace requests (e.g. reservations). Customers can opt out of future data collection at any time, as described in the [Now Assist Opt-Out page](#).

For more information, see the [Now Assist documentation](#).

Troubleshoot and get help

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

Agentic workflow in Now Assist for Core Business Suite

Agentic workflows in Now Assist for Core Business Suite support the Core Business Suite setup process through a conversational interface.

Available agentic workflows for Now Assist for Core Business Suite

Agentic workflow name	Description	Available AI agents
AI agentic workflow for the CBS setup	Supports Core Business Suite configuration through a guided, conversational setup flow. The workflow walks administrators through setup steps, tracks configuration progress, and identifies the next configuration actions. If a setup step does not complete successfully, the workflow provides contextual guidance to address the issue and continue the setup process.	<ul style="list-style-type: none"> • CBS configuration agent • IA orchestration agent • Manage groups and roles agent • Notification agent • CBS bulk upload agent

AI agents used in the AI Agentic Workflow for the CBS Setup

The following AI agents are used to support the conversational setup process for Core Business Suite.

AI agents

AI agent Name	Description
CBS configuration agent	Invokes CBS#specific scripts and tools to complete CBS tasks through a conversational setup flow.
IA orchestration agent	Coordinates CBS and business unit setup steps by sequencing installation and configuration actions based on user input and the current system state.
Manage groups and roles agent	Creates and assigns groups and roles across CBS business units to support setup requirements without manual navigation.
Notification agent	Configures notification settings for CBS business units to support request, approval, and workflow notifications.
CBS bulk upload agent	Processes bulk data uploads for Workplace Services and Source#to#Pay business units by importing records and configuration data.

For more information on the AI agents, see [AI Agent Studio \(legacy\)](#) .

Configure groups and roles

Configure groups and roles for Core Business Suite business units through the Now Assist conversational experience.

Before you begin

Ensure that Now Assist in Virtual Agent is installed. For more information, see .

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. Select **Manage Groups** under the CBS business unit you want to configure (for example, Human Resources, Legal, Finance, Health and Safety, Workplace Services, or Source-to-Pay).
5. Select **Configure with Now Assist**.

Now Assist opens the conversational panel, detects the current page context, and invokes the Groups and Roles Agent.

Note: Now Assist guides you through follow#up questions and requests confirmation before completing an action.

6. Select an option or enter a natural#language prompt.

- Assign user(s) to a group
- Assign roles(s) to a group
- Create Group

Example prompts:

- Add [username] to the [group name]
- Assign [role] to the [group name]
- Create [group name]

Now Assist processes your input and displays the available groups.

7. Select the required group from the list.
8. Respond to the follow#up questions provided by Now Assist.
9. Provide any additional information requested in the conversation panel.
Now Assist prepares an action summary based on your responses.
10. Review the action summary.
11. Select **Yes** to confirm and proceed, or **No** to cancel.
12. If prompted, provide additional confirmation.
Now Assist completes the action and displays a success message.

Create a notification

Create notifications for Core Business Suite business units through the Now Assist conversational experience.

Before you begin

Ensure that Now Assist in Virtual Agent is installed. For more information, see .

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. Select **Notifications** under the business unit you want to configure (for example, Human Resources, Legal, Finance, Health and Safety, Workplace Services, or Source-to-Pay).
5. Select **Configure with Now Assist**.

Now Assist opens the conversational panel, detects the current page context, and invokes the Notification Agent.

Note: Now Assist guides you through follow#up questions and requests confirmation before creating the notification.

6. Select **Create a new notification**, or enter a natural#language prompt.
Example prompts:

- Notify the fulfiller when an [BU name] case is assigned
- Notify the employee when an [BU name] case is resolved or closed
- Set up a notification for managers when their direct reports open an [BU name] request

7. Respond to the follow#up questions provided by Now Assist, such as:

- The table the notification applies to
- The trigger criteria (on create, update, or both)
- The recipients (users, groups, or fields)

Now Assist processes your responses and prepares the notification details.

8. Review the notification details.

9. Select one of the following options:

- **No, looks good** to confirm
- **Yes, I'd like to make changes** to update the details

10. If you choose to make changes, enter the updates when prompted.
Now Assist revises the notification and presents the updated details.

11. Review the updated notification details and confirm.
Now Assist creates the notification and displays a success message.

Edit a notification

Edit notifications for Core Business Suite business units through the Now Assist conversational experience.

Before you begin

Ensure that Now Assist in Virtual Agent is installed. For more information, see .

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. Select **Notifications** under the business unit you want to configure (for example, Human Resources, Legal, Finance, Health and Safety, Workplace Services, or Source-to-Pay).
5. Select **Configure with Now Assist**.

Now Assist opens the conversational panel, detects the current page context, and invokes the Notification Agent.

i Note: Now Assist guides you through follow#up questions and requests confirmation before saving changes.

6. Select **Edit an existing notification**, or enter a natural#language prompt.
Example prompts:

- Edit/update/modify notification for [BU name] case assignment to fulfiller.
- Edit/update/modify notification for [BU name] case resolution or closure to employee.
- Edit/update/modify notification for managers when direct reports open an [BU name] request.

7. Enter the name of the email notification when prompted.

Now Assist retrieves the notification record and displays a link for review.

8. Review the notification record.

9. Enter the changes you want to make.

Now Assist applies your updates and presents the revised notification details.

10. Review the updated notification details and confirm.

Now Assist saves the changes and displays a success message.

Bulk upload

Upload records in bulk for Core Business Suite business units through the Now Assist conversational experience.

Before you begin

Ensure that Now Assist in Virtual Agent is installed. For more information, see .

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.

2. On the Core Business Suite card, select **View product overview**.

3. In the Configuration insights section, select **Configure**.

The Configure Core Business Suite page opens in the Configuration Console.

4. From the navigation menu, select the section to which you want to bulk upload the details:

- **Workplace locations** under Workplace Services
- **Supplier management**, or **Supplier contacts** under Source-to-Pay

5. Select **Configure with Now Assist**.

Now Assist opens the conversational panel, detects the current page context, and invokes the CBS Bulk Upload Agent.

Note: Now Assist guides you through follow-up questions and requests confirmation before completing the bulk upload.

6. Select an **Bulk upload** or enter a natural language prompt:

Example prompts:

- Bulk upload workplace locations.
- Upload multiple workplace locations using a template.
- Bulk upload records for workplace locations.

Now Assist processes your request, identifies the relevant template based on the selection, and provides it for download.

7. Download the bulk template.

8. Enter the required data in the template and save the file.
9. Upload the updated template when prompted.
Now Assist analyzes the uploaded file and validates the data.
10. Review the validation results.
11. If errors are reported, open the provided import link and correct the issues.
12. If validation is successful, select **Process all rows**.
Now Assist processes the import and provides access to the import set.
13. Select **Import Set** to review the imported records.
14. Confirm that the updates are reflected.
15. Select **Mark as configured** when prompted.
Now Assist confirms the bulk upload is completed with a success message.
16. Refresh the CBS Configuration Console to verify that the records were created successfully.

Bulk edit

Edit records in bulk for Core Business Suite business units through the Now Assist conversational experience.

Before you begin

Ensure that Now Assist in Virtual Agent is installed. For more information, see .

Role required: admin, sn_cbs.admin

Procedure

1. Navigate to **Admin > Admin Home**.
2. On the Core Business Suite card, select **View product overview**.
3. In the Configuration insights section, select **Configure**.
The Configure Core Business Suite page opens in the Configuration Console.
4. Select **Workplace locations** under Workplace Services.
5. Select **Configure with Now Assist**.

Now Assist opens the conversational panel, detects the current page context, and invokes the CBS Bulk Upload Agent.

Note: The CBS Bulk Upload Agent supports Workplace Locations for bulk edit.

6. Select **Bulk edit** or enter a natural#language prompt.

Example prompts:

- Bulk edit workplace locations.
- Upload edit workplace locations using a template.
- Bulk edit records for workplace locations.

Now Assist processes your request, identifies the relevant template based on the selection, and provides it for download.

7. Download the template.
The template downloads as a .csv file.
8. Open the file in excel (.xlsx or .xls), make the required changes, and save it.
9. Upload the updated template when prompted.

Now Assist analyzes the uploaded file and validates the data.

10. Review the validation results.

11. If errors are reported, open the provided import link and correct the issues.

12. If validation is successful, select **Process all rows**.

Now Assist processes the updates and provides access to the import set.

13. Select **Import Set** to review the updated records.

14. Confirm that the changes are reflected.

15. Select **Mark as configured** when prompted.

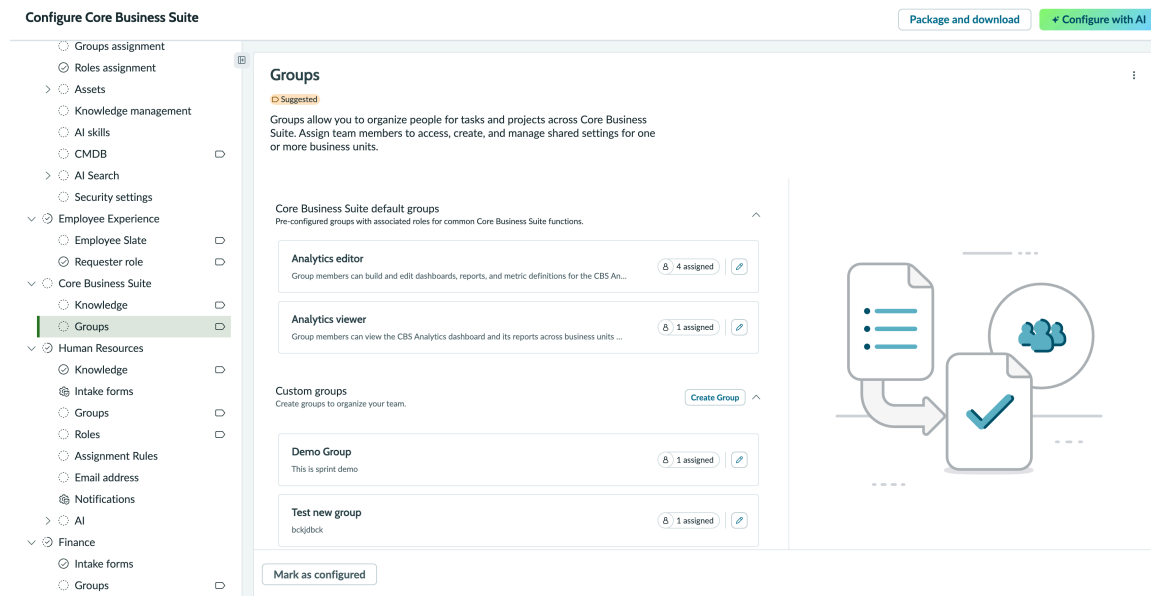
Now Assist confirms the bulk edit is completed with a success message.

16. Refresh the CBS Configuration Console to verify that the records were updated successfully.

Groups in Core Business Suite module

Groups enable you to organize people for tasks and projects across Core Business Suite. Assign team members to access, create, and manage shared settings for one or more business units.

Core Business Suite version 3.3.2 has analytics editor and analytics viewer roles by default. You can select the edit button to add or remove people from those roles.



Groups enable you to manage permissions and access control efficiently across your Core Business Suite implementation. Any business rules, assignment rules, system roles, or attributes that refer to the group apply to all group members automatically.

Edit groups in Core Business Suite module

Edit default groups to add or remove members in Core Business Suite.

Before you begin

Role required: admin

About this task

Modify group membership to control access to analytics and other Core Business Suite features.

Procedure

1. Navigate to **Core Business Suite > Configure**.
2. Select **Groups** under Core Business Suite module.
3. Select the edit icon on either one of the default groups to add or remove someone in the group.
 - Analytics editor group has role: sn_cbs_analytics.dashboard_editor
 - Analytics viewer group has role: sn_cbs_analytics.dashboard_viewer

Create group in Core Business Suite module

Create custom groups for specific Core Business Suite functions and assign roles to group members.

Before you begin

Role required: admin

About this task

Create custom groups to organize users for specific business functions within Core Business Suite.

Procedure

1. Navigate to **Core Business Suite > Configure**.
2. Select **Groups** under Core Business Suite module.
3. Select the **Create group** button to navigate to the create group page.
4. On the Create group page, fill in the fields and select **Save**.
For more details on the field descriptions, see [Create group form](#).

Result

You created a custom group. You can start adding people to the group.

Knowledge Base in Core Business Suite

The Knowledge module in Core Business Suite enables you to adjust settings for the default knowledge bases. It enables importing articles to support cross-functional knowledge sharing across business units in Core Business Suite.

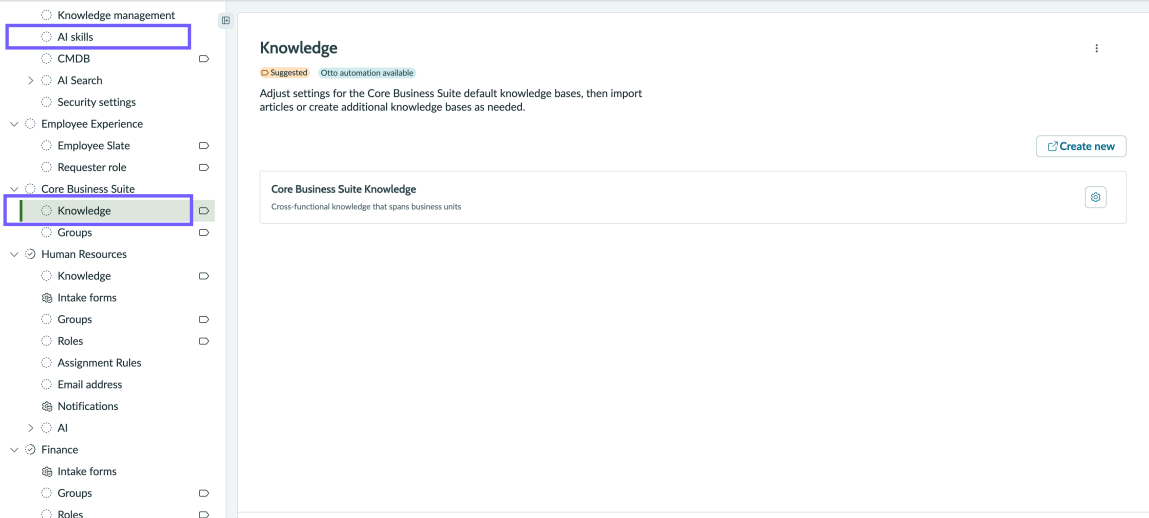
The Knowledge module is accessible through the Configuration Console in Core Business Suite. The module provides centralized management of knowledge bases that contain cross-functional Knowledge spanning multiple business units.

Knowledge module in CBS

Configure Core Business Suite

Package and download

Configure with AI



You can edit existing knowledge bases using the settings icon displayed next to each Knowledge Base. The default Knowledge Base, Core Business Suite Knowledge, supports cross-functional Knowledge that spans business units and supports employee and supplier requests as added by the CBS admins.

The Knowledge module is available across business unit modules within the Configuration Console. You can perform the same configuration actions for Knowledge Base articles in the Human Resources, Health and Safety, Legal, Source-to-Pay, and Workplace Services modules.

The Knowledge module supports the following capabilities:

- Import knowledge articles to the portal.
- Create additional knowledge bases for specific business needs.
- Manage publish and retire workflows for knowledge articles.
- Assign ownership and management responsibilities.
- Adjust the settings of the default Knowledge Base at a product-level or at a business unit-level.

Permissions

Two default knowledge management permissions are available in the Knowledge module **Can Read** and **Can Contribute** for the distribution of access. The **Can Read** permission lets you read the knowledge base articles, whereas, the **Can Contribute** permission lets you edit the article.

You can edit the permissions both at a product-level and at a business unit-level to add or remove groups or roles from the default user criteria.

For more information on editing permissions, see

- [Edit permissions for CBS Knowledge Authors](#)
- [Edit permissions for CBS Knowledge Readers](#)

AI skills for Knowledge management

You can use the following skills in the AI skills module to manage the Knowledge module within Core Business Suite.

AI skills for Knowledge

AI skill	Description
Identify duplicate articles	Identification of duplicate articles and recommendations for merging.
Knowledge Content Recommendation	ServiceNow Otto context menu recommendations to edit the Knowledge Base articles. Enhanced Content Editor to create or modify Knowledge Base articles with customized instructions.
Article Optimization recommendation	Recommendations for possible improvements in existing articles.
Merge duplicate articles	Recommendation to merge similar articles to keep Knowledge organized.

Edit Knowledge Base

Edit knowledge base settings to configure workflows, ownership, and management for Core Business Suite knowledge bases.

Before you begin

Role required: sn_cbs.admin

Note: You can add additional owners and managers to the Knowledge Base beyond the CBS admin. For more information, see [Edit Knowledge Base form](#).

About this task

Modify knowledge base settings to control how articles are published, retired, and managed across your organization.

Procedure

1. Navigate to **Core Business Suite > Configure**.
2. Select **Knowledge** in Core Business Suite module under the Configuration Console.
You can perform the same steps to edit knowledge bases under each business unit module.
3. Select the gear icon  on the default Knowledge Base at the Core Business Suite level or at a business unit-level.
You're on the **Settings** tab.
4. On the Edit knowledge base form, fill in the fields and select **Save**.
For a description of the field values, see [Edit Knowledge Base form](#).

Result

You have edited the default Knowledge Base settings to your requirement. You can navigate to the default permission records from the same page to manage permissions.

Related topics

[Edit permissions for CBS Knowledge Authors](#)

[Edit permissions for CBS Knowledge Readers](#)

Import Knowledge Base articles

Import Knowledge Base articles from Word documents to populate your Core Business Suite knowledge bases with existing content.

Before you begin

Role required: sn_cbs.admin

About this task

Import articles from .doc or .docx files to quickly populate knowledge bases with existing documentation.

Procedure

1. Navigate to **Core Business Suite > Configure**.
2. Select **Knowledge** in Core Business Suite module under the Configuration Console.
You can perform the same steps to import articles under each business unit module.
3. Select the gear icon  on the default Knowledge Base at the Core Business Suite level or at a business unit-level.
4. Go to the **Articles** tab and select **Upload files** to import articles.
The supported formats to upload are .doc and .docx.
5. Select the **Select file** button and select **Convert to article(s)** to create a Knowledge Base article from your documents.
You can create one or many Knowledge Base articles at one time.

Result

You have imported documents to create Knowledge Base articles in Core Business Suite.

Create a Knowledge Base

Knowledge bases are created in Knowledge Center and can be created at a business unit level or at a product level in the Core Business Suite.

Before you begin

Role required: sn_cbs.admin

About this task

Create knowledge bases to organize and manage knowledge articles for your organization.

Procedure

1. Navigate to **Core Business Suite > Configure**.
2. Select **Knowledge** in Core Business Suite module under the Configuration Console, and select the **Create new** button.
3. On the Create New Knowledge Base form, fill in the fields.
4. Select **Save**.
For a description of the field values, see [Create a knowledge base](#) .

Edit permissions for CBS Knowledge Authors

Edit the Can Contribute user criteria to add knowledge authors and editors in Core Business Suite.

Before you begin

Role required: sn_cbs.admin

About this task

You can perform the same steps to edit knowledge bases under each business unit module.

Procedure

1. Navigate to **Core Business Suite > Configure**.
2. Select **Knowledge** in Core Business Suite module under the Configuration Console.
3. In the Manage Permissions section, select the default Can Contribute user criteria.
4. On the CBS Knowledge Authors form page, fill in the fields and select **Save**.
For a description of the form values, see [CBS Knowledge Authors form](#).

Result

The user criteria is updated with the specified knowledge authors and editors.

Edit permissions for CBS Knowledge Readers

Edit the Can Read user criteria to add knowledge readers in Core Business Suite.

Before you begin

Role required: sn_cbs.admin

About this task

You can perform the same steps to edit knowledge bases under each business unit module.

Procedure

1. Navigate to **Core Business Suite > Configure**.
2. Select **Knowledge** in Core Business Suite module under the Configuration Console.
3. In the Manage Permissions section, select the default Can Read user criteria.
4. On the CBS Knowledge Readers form page, fill in the fields and select **Save**.
For a description of the form values, see [CBS Knowledge Readers form](#).

Result

The user criteria is updated with the specified knowledge readers.

Using Core Business Suite

Core Business Suite application provides a unified request experience across departments for organizations.

Otto requester experience

Requesters in CBS can use Now Assist in the conversational interface and in search functionality to raise requests and get AI-enabled responses.

After the Core Business Suite application setup, requesters gain access to enhanced Now Assist capabilities. These configurations enable AI assistance for raising and managing requests across HR, Legal services, Health & Safety, Workplace services, Finance, and Procurement.

The Now Assist configuration activates automatically when the **CBS NAVA preset** runs during installation. This one-time action establishes the foundation for Now Assist enabled requester interactions. For more information, see [Core Business Suite default configurations](#).

The conversational interface provides natural language interaction for request submission and support. Enhanced search functionality delivers relevant results from comprehensive data sources across departments.

The configuration aggregates data from all business units within your organization. This comprehensive data integration ensures requesters receive consistent and accurate information regardless of business unit affiliation.

The Now Assist search sources also consider your Employee Center content to resolve queries and service requests.

Raise requests on the employee portal

Raise a general request across departments, as an employee, on CBS.

Before you begin

Role required: sn_cbs.requestor

Procedure

1. Navigate to **Self-Service > Employee Center**.
2. In the **Help topics** widget, go to the topic card as require, and select a request form.
The following general request forms are available on the employee portal of CBS.
 - **Human resources**
 - **Workplace services**
 - **Legal services**
 - **Health and safety**
 - **Finance**
 - **Procurement**

You can raise general, payroll, and benefits requests with the HR department on CBS. For more information, see [Raise HR requests](#).

For more information on configuring the Help topic widget display, see [Configure instance options for Help topics widget](#).

3. Provide the request details and select **Submit**.

Raise HR requests

Raise an HR request for general requests, payroll, or benefits on CBS.

Before you begin

Role required: sn_cbs.requestor

Procedure

1. Navigate to **Self-Service > Employee Center**.
2. In the **Help topics** widget, go to the topic card you require, in this case **Human resources**.
3. Select any of the following options, fill in the required fields, and select **Submit**.
 - **Benefits request**
 - **Payroll request**

- **General HR request**

For more information on the field descriptions of each request form, see the following:

- [HR service catalog management](#) .
- [Report an issue with your payslip](#) .

Raise a general supplier request

Raise a general request for any common query or issue as a supplier on CBS.

Before you begin

Role required: sn_slm.contact

-  **Note:** This role is manually assigned to anyone by the admin who has access to the Supplier Collaboration Portal.

Procedure

1. Navigate to **Supplier Lifecycle Operations > Supplier Collaboration Portal > Raise a request**.
2. In the Categories list, go to **General**, and select **General request**.
3. In the general request form, fill in the fields.

General request - supplier

Field	Description
Who is this for?	Drop-down menu to select the name of the requester.
Supplier	Name of the supplier who is raising the request.
What can we help you with?	Field to provide details of the request or the issue.
Add attachments	Option to add an attachment related to the request.

4. Select **Submit**.

Raise an invoice request

Raise an invoice request for any payment-related issues as a supplier on CBS.

Before you begin

Role required: sn_slm.contact

-  **Note:** This role is manually assigned to anyone by the admin who has access to the Supplier Collaboration Portal.

Procedure

1. Navigate to **Supplier Lifecycle Operations > Supplier Collaboration Portal > Raise a request**.
2. In the Categories list, go to **Invoices**, and select **Invoice request**.
3. In the invoice request form, fill in the fields.

Invoice request form

Field	Description
Supplier	Name of the supplier who is raising the request.
Invoice number	Number of the invoice for which the request is raised.
What type of request is this?	<p>The following are the options available:</p> <ul style="list-style-type: none"> ○ None ○ Payment inquiry ○ Invoice inquiry ○ Expedite payment request ○ Payment terms issue ○ Invoice entry assistance ○ Other
What can we help you with?	Field to provide details of the request or the issue.
Add attachments	Option to add an attachment related to the request.

4. Select **Submit**.

Notifications in CBS

Notifications in CBS provide multi-faceted and timely communication when a request is raised or fulfilled.

Portal notifications

As an employee or a supplier when you raise a request on the CBS application, a portal notification is triggered acknowledge the submission. You receive a notification when your request is commented on, a task is assigned to you, or the request is closed.

You can open the request on the portal and add your comments. You can also add any supporting attachments, or respond to any query from the agent assigned to your support ticket. You can also view the details of your case as an employee or a supplier who has raised the request. For more information, see .

i Important:

- You must be on the Zurich release to have Notifications available by default in CBS.
- You must be, at the earliest, on the Yokohama release to install and use Notifications for Employee Center plugin (sn_ex_sp_notifs) in CBS.

Workspace notifications

Workspace notifications are simultaneously triggered for the agent who is working on your request for the employee support ticket or the supplier support ticket. The agent can add a comment for the requester, employee or supplier, add work notes. The agents can also create a task and mark the request complete when is it fulfilled.

The agent gets notifications when the requester has added a comment or an attachment to a request assigned to them.

For more information on workspace notifications, see .

Email notifications

The requester and the agent both receive email notifications when a request is raised, there's any new development on the request from either personas, or the request is closed.

You can view the request details along with a **View request** or **View case** button that opens either in the portal or the workspace depending on the persona.

For more information on email notifications, see [Email Notifications](#) .

Enhanced Requests Experience in Core Business Suite

The Enhanced Requests Experience in Core Business Suite gives employees a single place to view, track, and manage requests across departments, including Health and Safety and Finance.

The Enhanced Requests Experience is available in Core Business Suite (CBS) through the Employee Center portal. It consolidates requests from multiple departments into a single, organized view so employees can find and act on their requests without switching between portals.

Enhanced My Request experience overview

The Enhanced Requests Experience segments requests by type using a multiple-tab interface. The default tabs, **For you** and **For others**, display requests based on the employee's role and relationship to the request. Admins can configure additional tabs to meet organizational requirements.

Key capabilities include:

- Card view and list view toggle for flexible request display.
- Filter options such as **Request Type**, **State**, and **Location** to narrow results.
- **Drafts** tab to save requests before submission.
- Pagination when the number of requests exceeds 15 per page.
- Responsive view with a **Show more** option for filters that exceed the page length.

i Note: You must be on Employee Center version 38.0 or later, or have upgraded to the Australia release, to use the Enhanced Requests Experience.

Experience by persona

The Enhanced Requests Experience adapts to different user roles within CBS.

Request visibility by persona

Persona	Requests visible
Employee	<ul style="list-style-type: none"> • Requests created for themselves. • Requests created by others on their behalf. • Requests associated with their work location, when configured.

Request visibility by persona (continued)

Persona	Requests visible
Manager	<ul style="list-style-type: none"> • Requests created on behalf of the team. • Requests created by others for the team. • Requests associated with their work location, when configured.
Executive assistant	Requests created on behalf of others.

Health and Safety support

The Enhanced Requests Experience in CBS includes support for Health and Safety requests. Employees can submit and track Health and Safety inquiries — such as questions about procedures, training, or return-to-work policies — directly from the CBS employee portal.

Health and Safety requests appear alongside requests from other departments in the unified request view. Default configurations for Health and Safety include standard notifications and intake forms that activate automatically during installation. For more information, see [Health and Safety default configurations](#).

Finance support

The Enhanced Requests Experience in CBS also supports Finance business unit (BU) requests. Employees can submit general finance inquiries targeted to the finance department and track them alongside requests from other departments.

Default configurations for Finance include standard notifications and intake forms that activate automatically during installation. For more information, see [Finance default configurations](#).

Related information

- [Enhanced Requests Experience](#) 
- [Opt in to the enhanced Enhanced Requests Experience](#) 
- [Employee requests page](#) 
- [Employee support areas](#)

View Core Business Suite Analytics

Access all Core Business Suite (CBS) analytics in one place to monitor and review request activity across departments.

Before you begin

Role required: sn_cbs_analytics.dashboard_viewer

Procedure

1. Navigate to **Core Business Suite > Analytics Dashboard**.
2. View the components overall or by business unit.

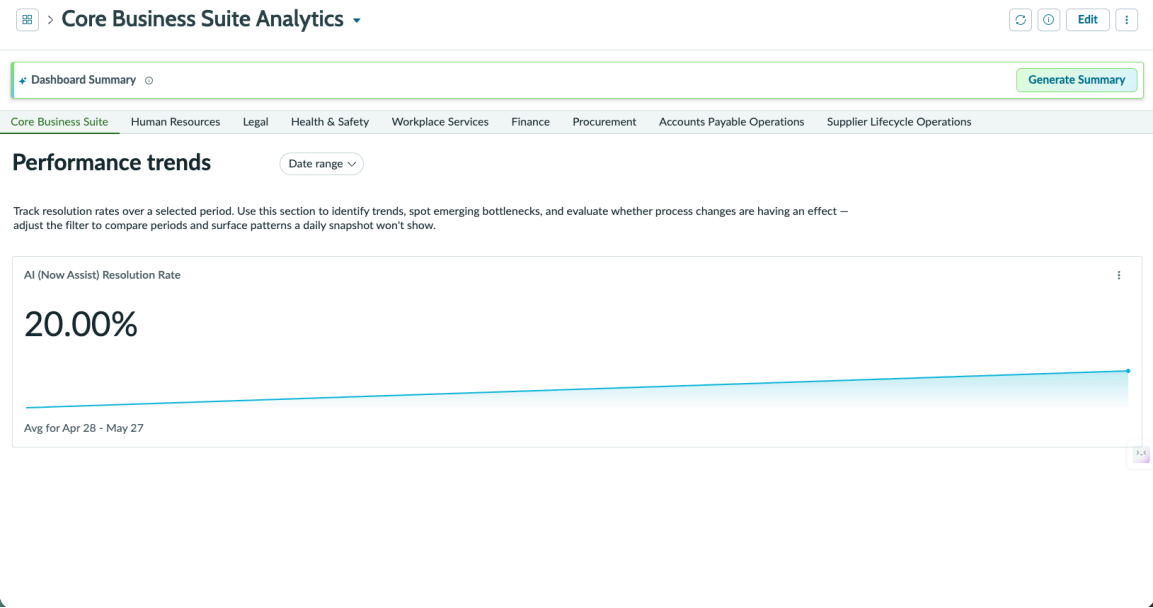
Result

The CBS analytics dashboard displays request activity and metrics across all departments.

Core Business Suite Analytics overview

The Core Business Suite (CBS) Analytics dashboard provides a unified view of performance metrics and resolution trends across all Business Units in your organization.

Dashboard data points



The CBS Analytics dashboard organizes data across a set of tabs and metric sections. The following data points are available on the main **Core Business Suite** tab.

Core Business Suite Analytics dashboard data points

Data point	Description
Dashboard summary	A summary section at the top of the dashboard. Select Generate Summary to produce an AI-generated overview of current dashboard data. Review the output carefully, as AI-generated content may not reflect all context and requires human verification before use.
Performance trends	Tracks resolution rates over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.
Date range filter	Controls the time window applied to the Performance trends section. Adjust the filter to compare different periods and surface longer-term patterns.
AI (Now Assist) Resolution Rate	Displays the percentage of requests resolved by AI (Now Assist) over the selected date range, shown as a trend line chart with an average value for the period. This metric reflects AI-assisted resolution and should be reviewed alongside human-handled resolution data for a complete picture. AI-generated values may not reflect all context — apply human review before acting on this data.

Core Business Suite Analytics roles

The following roles control access to the CBS Analytics dashboard and its Performance Analytics data.

CBS Analytics roles

Role	Description
<i>sn_cbs_analytics.dashboard_editor</i>	<p>Grants complete access to the CBS Analytics dashboard.</p> <p>Users assigned this role can view and edit metric placement and configuration across all business units in the CBS Analytics dashboard.</p>
<i>sn_cbs_analytics.dashboard_viewer</i>	<p>Grants read-only access to the CBS Analytics dashboard.</p> <p>Users assigned this role can only view metrics across all Business Units in the CBS Analytics dashboard.</p>

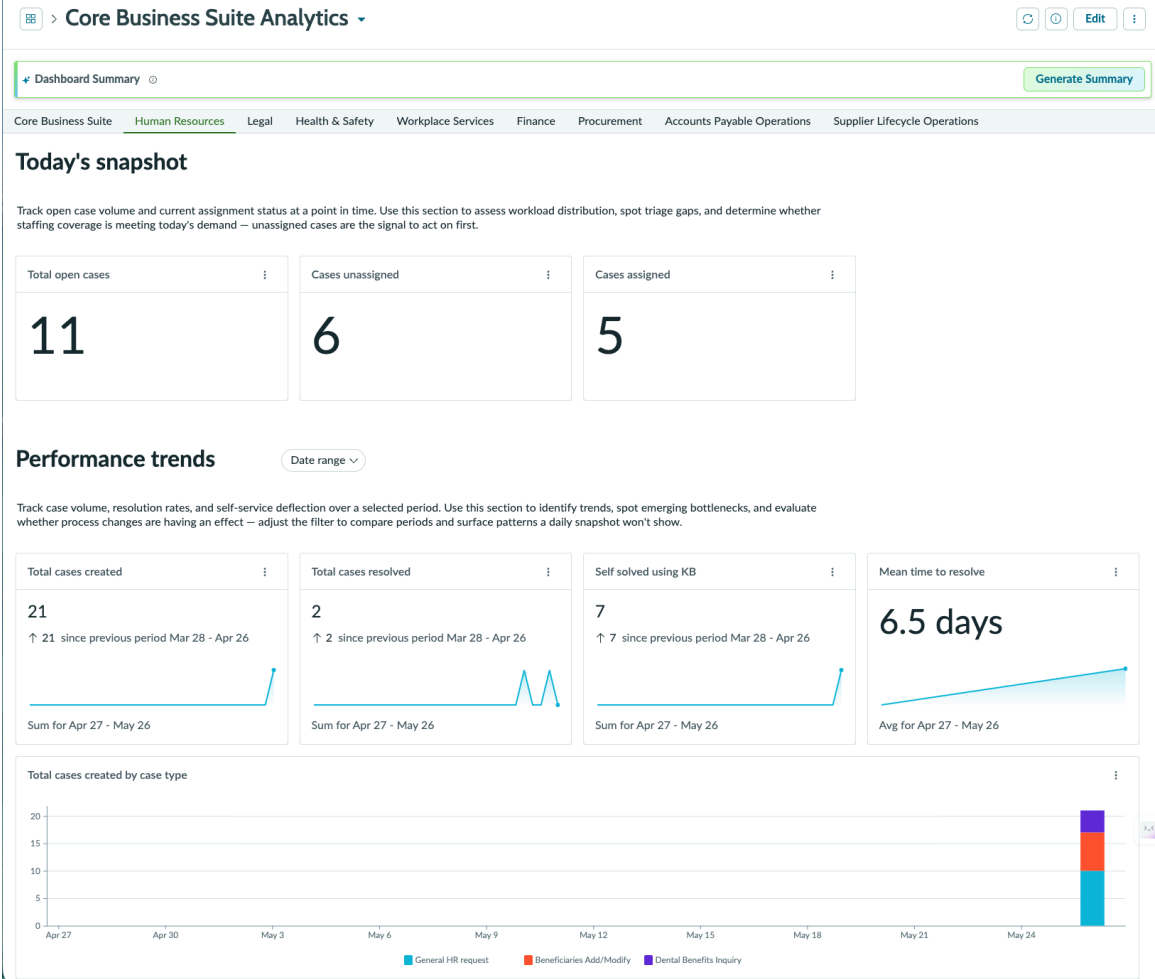
Business unit-specific data

BU-level data is available on the individual BU-specific tabs: **Human Resources, Legal, Health & Safety, Workplace Services, Finance, Procurement, Accounts Payable Operations,** and **Supplier Lifecycle Operations.**

Human Resources analytics on the CBS dashboard

The **Human Resources** tab on the Core Business Suite Analytics dashboard tracks open case volume and resolution trends for HR requests, helping managers assess workload distribution and identify staffing gaps.

Today's snapshot



The Today's snapshot section tracks open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting current demand. Unassigned cases are the signal to act on first.

Human Resources Today's snapshot metrics

Metric	Description
Total open cases	Total number of HR cases currently open. Example value: 11.
Cases unassigned	Number of open HR cases not yet assigned to an agent. Example value: 6.
Cases assigned	Number of open HR cases currently assigned to an agent. Example value: 5.

Performance trends

The Performance trends section tracks case volume, resolution rates, and self-service deflection over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.

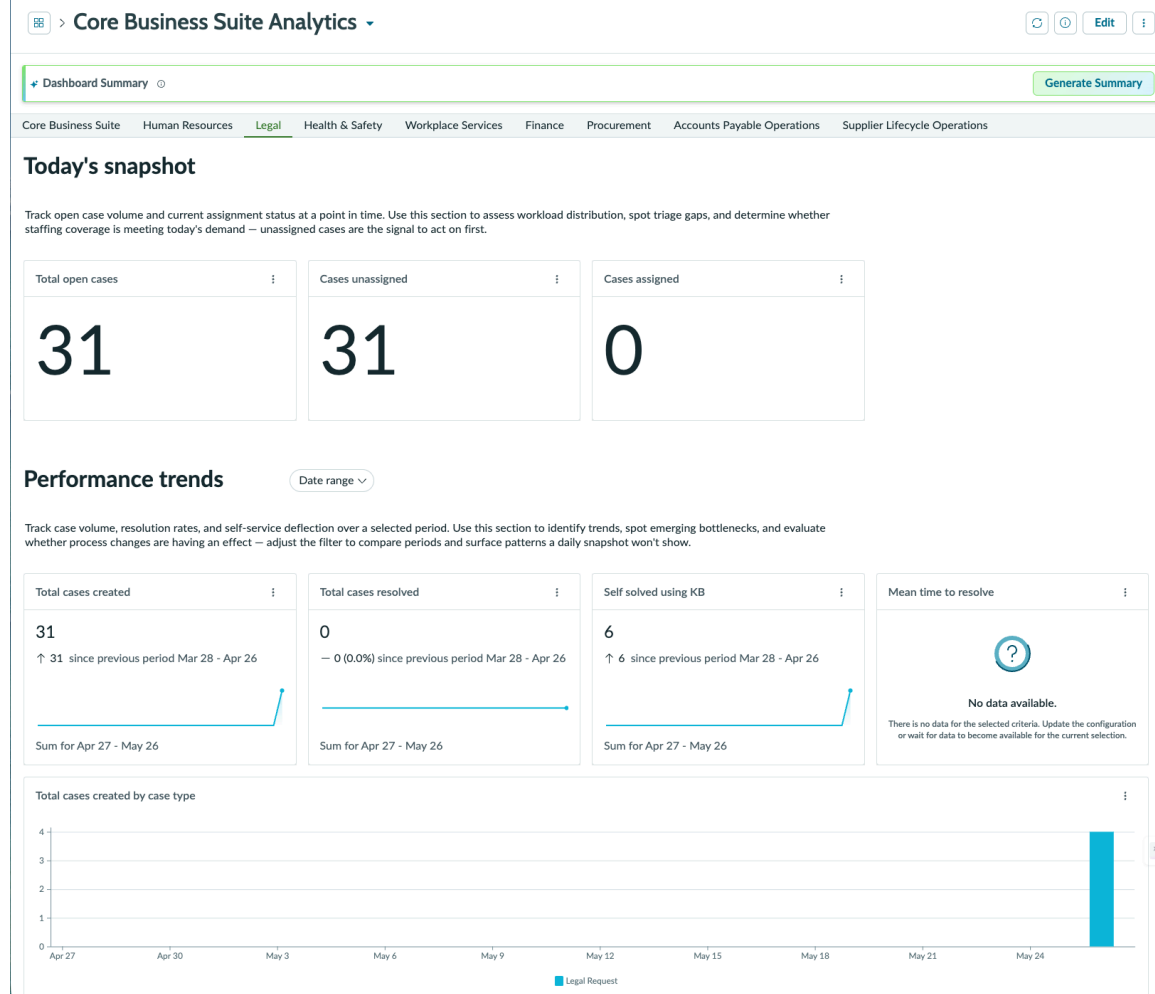
Human Resources Performance trends metrics

Metric	Description
Total cases created	Total number of HR cases created in the selected date range, with a comparison to the previous period. Example value: 21 cases created (up 21 from the previous period, March 28 – April 26).
Total cases resolved	Total number of HR cases resolved in the selected date range, with a comparison to the previous period. Example value: 2 cases resolved (up 2 from the previous period).
Self solved using KB	Number of HR cases resolved by employees themselves, using knowledge base articles, without agent involvement, and raising a service request 24 hours from consuming the data. Example value: 7 (up 7 from the previous period).
Mean time to resolve	Average number of days to resolve an HR case over the selected period. Example value: 6.5 days (average for April 27 – May 26).
Total cases created by case type	A chart showing case volume broken down by HR case type. Case types include: General HR request, Beneficiaries Add/Modify, and Dental Benefits Inquiry.

Legal analytics on the CBS dashboard

The **Legal** tab on the Core Business Suite Analytics dashboard tracks open legal case volume and resolution trends, helping managers identify unassigned cases and monitor legal request activity over time.

Today's snapshot



The Today's snapshot section tracks open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting current demand. Unassigned cases are the signal to act on first.

Legal Today's snapshot metrics

Metric	Description
Total open cases	Total number of legal cases currently open. Example value: 31.
Cases unassigned	Number of open legal cases not yet assigned to an agent. Example value: 31. When all open cases are unassigned, triage is the immediate priority.
Cases assigned	Number of open legal cases currently assigned to an agent. Example value: 0.

Performance trends

The Performance trends section tracks case volume, resolution rates, and self-service deflection over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.

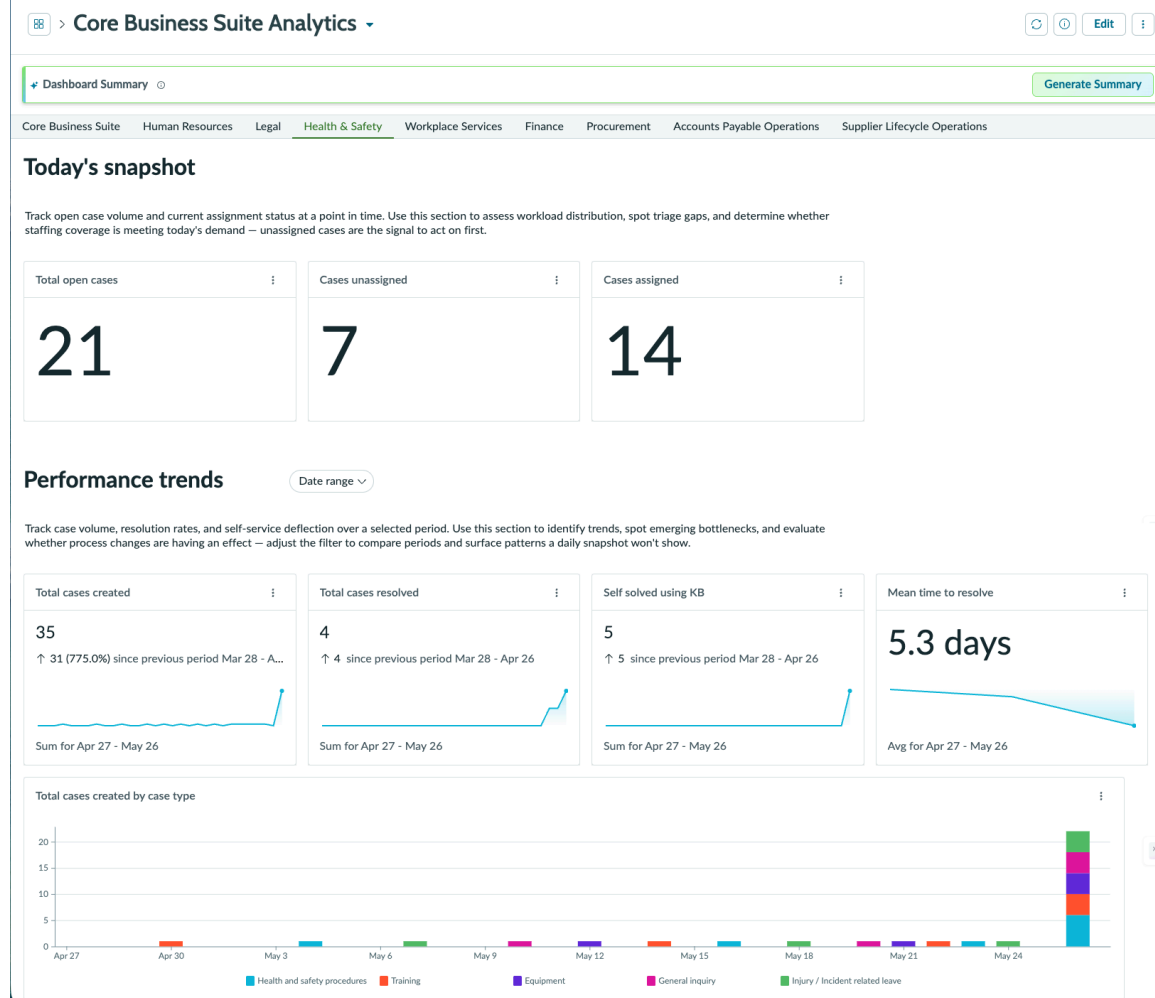
Legal Performance trends metrics

Metric	Description
Total cases created	Total number of legal cases created in the selected date range, with a comparison to the previous period. Example value: 31 cases created (up 31 from the previous period, March 28 – April 26).
Total cases resolved	Total number of legal cases resolved in the selected date range, with a comparison to the previous period. Example value: 0 cases resolved (0.0% change from the previous period).
Self solved using KB	Number of legal cases resolved by employees using knowledge base articles, without agent involvement, and raising a service request 24 hours from consuming the data. Example value: 6 (up 6 from the previous period).
Mean time to resolve	Average number of days to resolve a legal case over the selected period. No data is available when no cases have been resolved in the period.
Total cases created by case type	A chart showing case volume broken down by legal case type. Case types include: Legal Request.

Health & Safety analytics on the CBS dashboard

The **Health & Safety** tab on the Core Business Suite Analytics dashboard tracks open case volume and resolution trends for health and safety requests, helping managers monitor incident activity and staffing coverage.

Today's snapshot



The Today's snapshot section tracks open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting current demand. Unassigned cases are the signal to act on first.

Health & Safety Today's snapshot metrics

Metric	Description
Total open cases	Total number of health and safety cases currently open. Example value: 21.
Cases unassigned	Number of open health and safety cases not yet assigned to an agent. Example value: 7.
Cases assigned	Number of open health and safety cases currently assigned to an agent. Example value: 14.

Performance trends

The Performance trends section tracks case volume, resolution rates, and self-service deflection over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.

Health & Safety Performance trends metrics

Metric	Description
Total cases created	Total number of health and safety cases created in the selected date range, with a comparison to the previous period. Example value: 35 cases created (up 31, or 775.0%, from the previous period, March 28 – April 26).
Total cases resolved	Total number of health and safety cases resolved in the selected date range, with a comparison to the previous period. Example value: 4 cases resolved (up 4 from the previous period).
Self solved using KB	Number of health and safety cases resolved by employees using knowledge base articles, without agent involvement, and raising a service request 24 hours from consuming the data. Example value: 5 (up 5 from the previous period).
Mean time to resolve	Average number of days to resolve a health and safety case over the selected period. Example value: 5.3 days (average for April 27 – May 26).
Total cases created by case type	A chart showing case volume broken down by health and safety case type. Case types include: Health and safety procedures, Training, Equipment, General inquiry, and Injury / incident related leave.

Workplace Services analytics on the CBS dashboard

The **Workplace Services** tab on the Core Business Suite Analytics dashboard tracks open case volume and resolution trends for workplace service requests, helping managers monitor facility demand and staffing coverage.

Today's snapshot

Core Business Suite Analytics

Refresh Edit

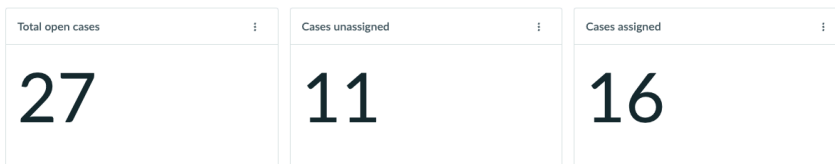
Dashboard Summary

Generate Summary

Core Business Suite Human Resources Legal Health & Safety **Workplace Services** Finance Procurement Accounts Payable Operations Supplier Lifecycle Operations

Today's snapshot

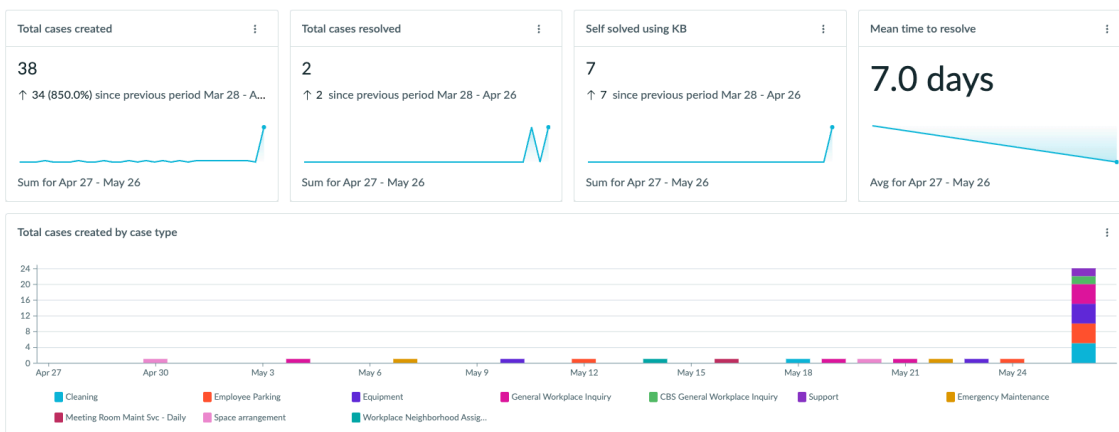
Track open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting today's demand — unassigned cases are the signal to act on first.



Performance trends

Date range

Track case volume, resolution rates, and self-service deflection over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect — adjust the filter to compare periods and surface patterns a daily snapshot won't show.



The Today's snapshot section tracks open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting current demand. Unassigned cases are the signal to act on first.

Workplace Services Today's snapshot metrics

Metric	Description
Total open cases	Total number of workplace service cases currently open. Example value: 27.
Cases unassigned	Number of open workplace service cases not yet assigned to an agent. Example value: 11.
Cases assigned	Number of open workplace service cases currently assigned to an agent. Example value: 16.

Performance trends

The Performance trends section tracks case volume, resolution rates, and self-service deflection over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.

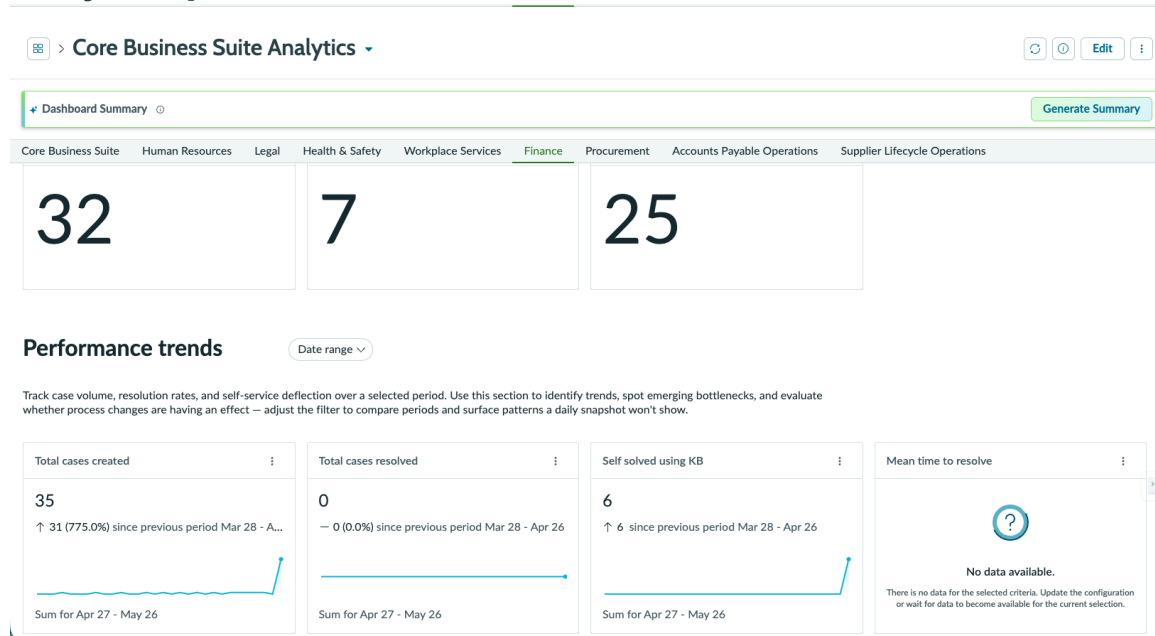
Workplace Services Performance trends metrics

Metric	Description
Total cases created	Total number of workplace service cases created in the selected date range, with a comparison to the previous period. Example value: 38 cases created (up 34, or 850.0%, from the previous period, March 28 – April 26).
Total cases resolved	Total number of workplace service cases resolved in the selected date range, with a comparison to the previous period. Example value: 2 cases resolved (up 2 from the previous period).
Self solved using KB	Number of workplace service cases resolved by employees using knowledge base articles, without agent involvement, and raising a service request 24 hours from consuming the data. Example value: 7 (up 7 from the previous period).
Mean time to resolve	Average number of days to resolve a workplace service case over the selected period. Example value: 7.0 days (average for April 27 – May 26).
Total cases created by case type	<p>A chart showing case volume, broken down by workplace service case type.</p> <p>Case types include:</p> <ul style="list-style-type: none"> • Cleaning • Employee parking • Equipment • General workplace inquiry • CBS general workplace inquiry • Support • Emergency maintenance • Meeting room maintenance service - daily • Space arrangement • Workplace neighborhood assignment

Finance analytics on the CBS dashboard

The **Finance** tab on the Core Business Suite Analytics dashboard tracks open case volume and resolution trends for finance requests, helping managers assess workload distribution and monitor finance case activity over time.

Today's snapshot



The Today's snapshot section tracks open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting current demand. Unassigned cases are the signal to act on first.

Finance Today's snapshot metrics

Metric	Description
Total open cases	Total number of finance cases currently open. Example value: 32.
Cases unassigned	Number of open finance cases not yet assigned to an agent. Example value: 7.
Cases assigned	Number of open finance cases currently assigned to an agent. Example value: 25.

Performance trends

The Performance trends section tracks case volume, resolution rates, and self-service deflection over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.

Finance Performance trends metrics

Metric	Description
Total cases created	Total number of finance cases created in the selected date range, with a comparison to the previous period. Example value: 35 cases created (up 31, or 775.0%, from the previous period, March 28 – April 26).
Total cases resolved	Total number of finance cases resolved in the selected date range, with a comparison to the previous period. Example value: 0 cases resolved (0.0% change from the previous period).

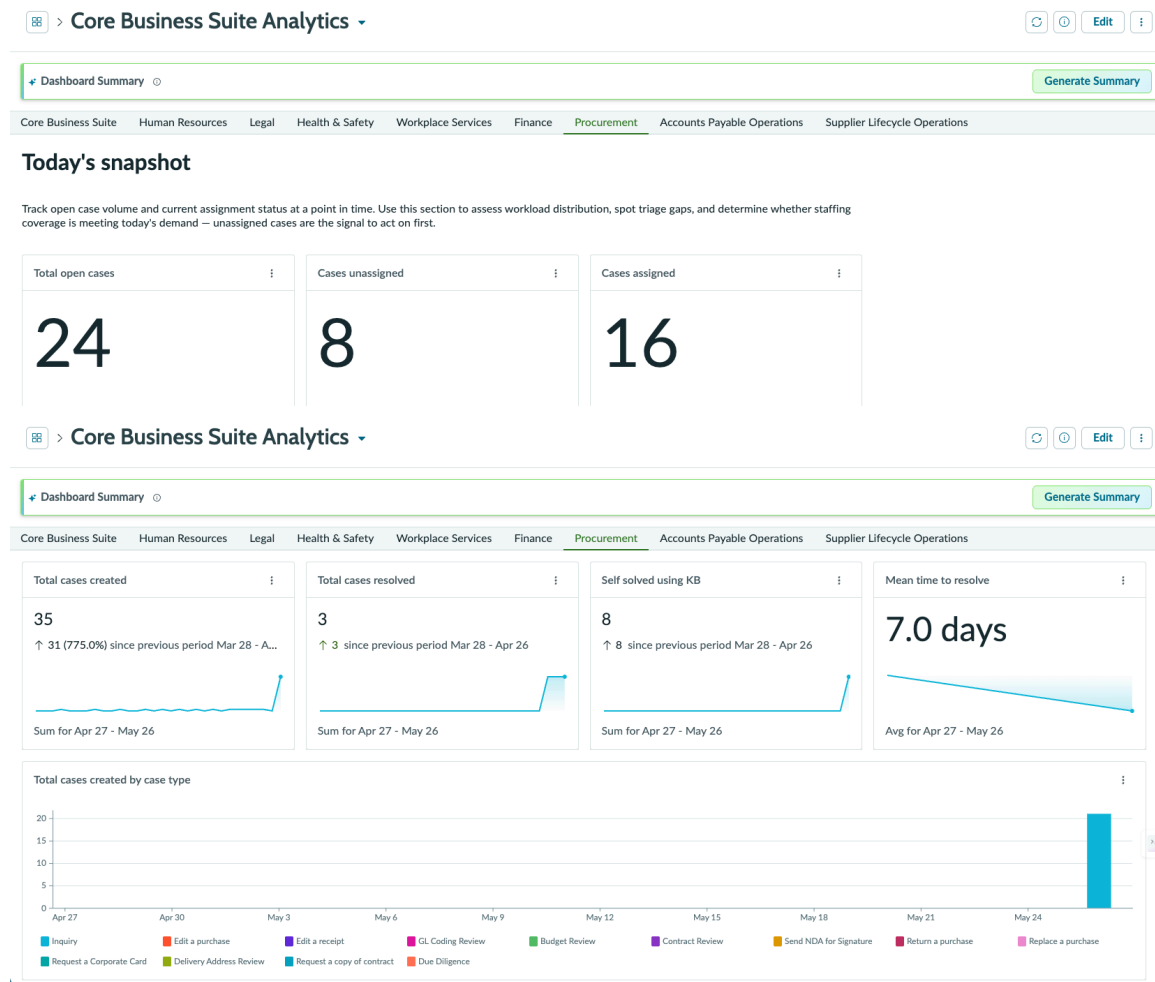
Finance Performance trends metrics (continued)

Metric	Description
Self solved using KB	Number of finance cases resolved by employees using knowledge base articles, without agent involvement, and raising a service request 24 hours from consuming the data. Example value: 6 (up 6 from the previous period).
Mean time to resolve	Average number of days to resolve a finance case over the selected period. No data is available when no cases have been resolved in the period.
Total cases created by case type	A chart showing case volume broken down by finance case type for the selected date range.

Procurement analytics on the CBS dashboard

The **Procurement** tab on the Core Business Suite Analytics dashboard tracks open case volume and resolution trends for procurement requests, helping managers monitor purchasing activity and identify staffing gaps.

Today's snapshot



The Today's snapshot section tracks open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting current demand. Unassigned cases are the signal to act on first.

Procurement Today's snapshot metrics

Metric	Description
Total open cases	Total number of procurement cases currently open. Example value: 24.
Cases unassigned	Number of open procurement cases not yet assigned to an agent. Example value: 8.
Cases assigned	Number of open procurement cases currently assigned to an agent. Example value: 16.

Performance trends

The Performance trends section tracks case volume, resolution rates, and self-service deflection over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.

Procurement Performance trends metrics

Metric	Description
Total cases created	Total number of procurement cases created in the selected date range, with a comparison to the previous period. Example value: 35 cases created (up 31, or 775.0%, from the previous period, March 28 – April 26).
Total cases resolved	Total number of procurement cases resolved in the selected date range, with a comparison to the previous period. Example value: 3 cases resolved (up 3 from the previous period).
Self solved using KB	Number of procurement cases resolved by employees using knowledge base articles, without agent involvement, and raising a service request 24 hours from consuming the data. Example value: 8 (up 8 from the previous period).
Mean time to resolve	Average number of days to resolve a procurement case over the selected period. Example value: 7.0 days (average for April 27 – May 26).
Total cases created by case type	Chart shows case volume broken down by procurement case type. <ul style="list-style-type: none"> • Inquiry • Edit a purchase • Edit a receipt • GL coding review • Budget review • Contract review • Send NDA for signature • Return a purchase • Replace a purchase • Request a corporate card • Delivery address review

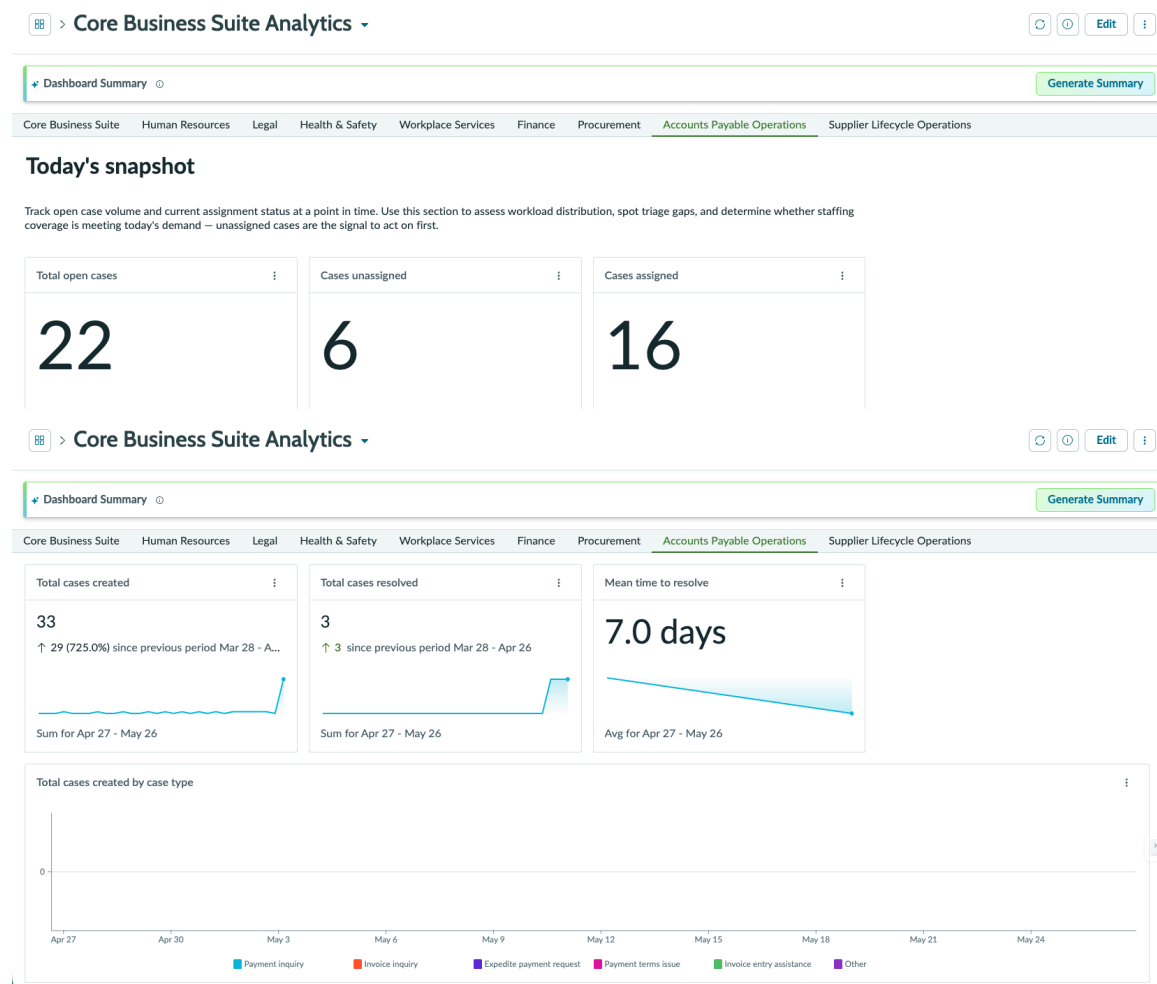
Procurement Performance trends metrics (continued)

Metric	Description
	<ul style="list-style-type: none"> Request a copy of contract Due diligence

Accounts Payable Operations analytics on the CBS dashboard

The **Accounts Payable Operations** tab on the Core Business Suite Analytics dashboard tracks open case volume and resolution trends for accounts payable requests, helping managers monitor invoice and payment activity.

Today's snapshot



The Today's snapshot section tracks open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting current demand. Unassigned cases are the signal to act on first.

Accounts Payable Operations Today's snapshot metrics

Metric	Description
Total open cases	Total number of accounts payable cases currently open. Example value: 22.
Cases unassigned	Number of open accounts payable cases not yet assigned to an agent. Example value: 6.
Cases assigned	Number of open accounts payable cases currently assigned to an agent. Example value: 16.

Performance trends

The Performance trends section tracks case volume and resolution rates over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.

Accounts Payable Operations Performance trends metrics

Metric	Description
Total cases created	Total number of accounts payable cases created in the selected date range, with a comparison to the previous period. Example value: 33 cases created (up 29, or 725.0%, from the previous period, March 28 – April 26).
Total cases resolved	Total number of accounts payable cases resolved in the selected date range, with a comparison to the previous period. Example value: 3 cases resolved (up 3 from the previous period).
Mean time to resolve	Average number of days to resolve an accounts payable case over the selected period. Example value: 7.0 days (average for April 27 – May 26).
Total cases created by case type	A chart showing case volume broken down by accounts payable case type. Case types include: Payment inquiry, Invoice inquiry, Expedite payment request, Payment terms issue, Invoice entry assistance, and Other.

Supplier Lifecycle Operations analytics on the CBS dashboard

The **Supplier Lifecycle Operations** tab on the Core Business Suite Analytics dashboard tracks open case volume and resolution trends for supplier requests, helping managers monitor supplier activity and identify staffing gaps.

Today's snapshot

Core Business Suite Analytics

Generate Summary

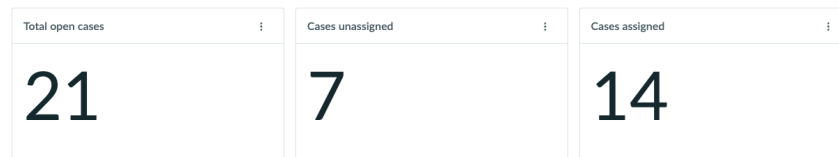
Dashboard Summary

Generate Summary

Core Business Suite Human Resources Legal Health & Safety Workplace Services Finance Procurement Accounts Payable Operations **Supplier Lifecycle Operations**

Today's snapshot

Track open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting today's demand — unassigned cases are the signal to act on first.



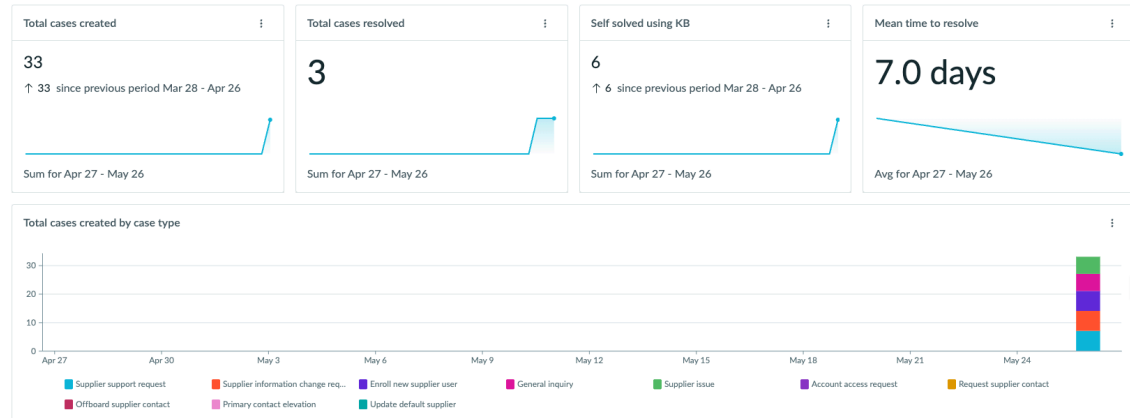
Core Business Suite Analytics

Generate Summary

Dashboard Summary

Generate Summary

Core Business Suite Human Resources Legal Health & Safety Workplace Services Finance Procurement Accounts Payable Operations **Supplier Lifecycle Operations**



The Today's snapshot section tracks open case volume and current assignment status at a point in time. Use this section to assess workload distribution, spot triage gaps, and determine whether staffing coverage is meeting current demand. Unassigned cases are the signal to act on first.

Supplier Lifecycle Operations Today's snapshot metrics

Metric	Description
Total open cases	Total number of supplier lifecycle cases currently open. Example value: 21.
Cases unassigned	Number of open supplier lifecycle cases not yet assigned to an agent. Example value: 7.
Cases assigned	Number of open supplier lifecycle cases currently assigned to an agent. Example value: 14.

Performance trends

The Performance trends section tracks case volume, resolution rates, and self-service deflection over a selected period. Use this section to identify trends, spot emerging bottlenecks, and evaluate whether process changes are having an effect. Adjust the date range filter to compare periods and surface patterns that a daily snapshot does not show.

Supplier Lifecycle Operations Performance trends metrics

Metric	Description
Total cases created	Total number of supplier lifecycle cases created in the selected date range, with a comparison to the previous period. Example value: 33 cases created (up 33 from the previous period, March 28 – April 26).
Total cases resolved	Total number of supplier lifecycle cases resolved in the selected date range. Example value: 3 cases resolved.
Self solved using KB	Number of supplier lifecycle cases resolved by employees using knowledge base articles, without agent involvement, and raising a service request 24 hours from consuming the data. Example value: 6 (up 6 from the previous period).
Mean time to resolve	Average number of days to resolve a supplier lifecycle case over the selected period. Example value: 7.0 days (average for April 27 – May 26).
Total cases created by case type	A chart showing case volume broken down by supplier lifecycle case type. Case types include: Supplier support request, Supplier information change request, Enroll new supplier user, General inquiry, Supplier issue, Account access request, Request supplier contact, Offboard supplier contact, Primary contact elevation, and Update default supplier.

Core Business Suite reference

The reference topics provide details of the properties, forms, lists, roles, tables, and widgets you want to configure to use the CBS application.

Components installed with Core Business Suite

Various components are installed with Core Business Suite.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#).

Core Business Suite Roles

Roles installed with Core Business Suite

Role title [name]	Description	Contains roles
Core Business Suite Administrator (sn_cbs.admin)	Provides administrative permissions for the Core Business Suite application and full access to configure its underlying services.	<ul style="list-style-type: none"> ESC Admin & Taxonomy admin Human Resources (sn_hr_core.admin) Workplace Services Delivery (sn_wsd_core.workplace_admin) Legal (sn_lg_ops.legal_admin)

Roles installed with Core Business Suite (continued)

Role title [name]	Description	Contains roles
		<ul style="list-style-type: none"> Procurement (sn_spend_psd.admin) Supplier Lifecycle Operations (sn_slm.admin) Accounts Payable Operations (sn_ap_cm.admin) Finance (sn_fin_ops.admin) Health and Safety (sn_ohs_im.admin)
Core Business Suite requester (sn_cbs.requestor)	Grants permissions to submit requests for services included in the Core Business Suite application.	<ul style="list-style-type: none"> Human Resources (sn_hr_core.hrsm_employee) Legal (sn_lg_ops.legal_user) Workplace Services Delivery (sn_wsd_core.workplace_user) Procurement (sn_spend_psd.requestor) Finance (sn_fin_ops.requester) Health and Safety (sn_hs_cm.case_reporter)

Components installed with Core Business Suite applications

Application	Component information
Legal Service Delivery	Components installed with Legal Request Management
HR Service Delivery	Components installed with Case and Knowledge Management
Workplace Services Delivery	Components installed with Workplace Case Management
Health and Safety	Components installed with Health and Safety Risk Management
Sourcing and Procurement Operations	Components installed with Sourcing and Procurement Operations

Application	Component information
Finance and Supply Chain applications	Components installed with Finance Case Management ↗
Supplier Lifecycle Operations	Components installed with Supplier Case Management ↗
Accounts Payable Operations	Components installed with Accounts Payable Invoice Processing ↗

Core Business Suite terminology

Glossary of terms used in the Core Business Suite documentation.

Advanced Portal Navigation

A navigation framework in Core Business Suite that provides an intuitive portal navigation structure for the employee portal. All employee portal request forms are accessible under Advanced Portal Navigation.

Assignment rule

A rule in Core Business Suite that defines when and how tasks are assigned to a group or user based on specified conditions. Assignment rules evaluate incoming tasks and route them to the appropriate group or individual.

Business unit

A functional department within an organization that is represented as a module in Core Business Suite. Business units include Human Resources, Legal, Health and Safety, Workplace Services, Finance, and Procurement.

CBS admin

A role [sn_cbs.admin] in Core Business Suite that manages administrative permissions and has complete access to all configurations in the application.

CBS Client Role Rule

A form in Core Business Suite used to define conditions that determine how the CBS requester role is assigned to employees. Administrators use this form to control which employees receive the requester role based on specific filter conditions.

CBS requester

A requester role [sn_cbs.requestor] in Core Business Suite that grants permission to submit requests for different services across business units.

Configuration Console

The central interface in Core Business Suite where administrators configure business unit settings, requester role assignments, and Employee Experience options.

Core Business Suite

A collection of modules that unifies disjointed business processes and fulfills different business needs for different personas within a single product suite. Available in Foundation, Advanced, and Prime subscription tiers.

CBS

Default configurations

Preconfigured settings in Core Business Suite that are applied automatically when Apply default configurations is selected during installation. These include Now Assist Virtual Agent enablement and Employee Center configuration settings such as taxonomy, navigation, home page layout, and quick links.

Employee Slate

The default employee support portal for Core Business Suite. Employee Slate provides a consolidated view of Employee Center widgets with a conversational interface for raising issues, asking for information, and submitting business unit-specific service requests. Available from Core Business Suite Foundation version 3.0.5 onwards.

Enhanced My Request experience

A unified request view in Core Business Suite that gives employees a single place to view, track, and manage requests across departments. The experience segments requests by type using a multiple-tab interface with filter, card view, and list view options.

Now Assist for Core Business Suite

A guided conversational experience that supports administrators during Core Business Suite configuration. It tracks configuration progress, displays next actions, and assists with error resolution from a single chat interface using AI skills and agentic workflows.

Product Hub

A setup interface in Core Business Suite where administrators can set up the application based on their subscription tier (Foundation, Advanced, or Prime) and check entitlements.

Help topics instance options

The details provide the field and its descriptions of the widget instance options.

Instance options form

Field	Description
Widget Title	Title or name of the widget.
Heading Level	Heading level on the user interface for the widget.
Topic Card Display Style	The following are the available options:

Instance options form (continued)

Field	Description
	<ul style="list-style-type: none"> • None: Default number of content is selected on the card to display. For more than 2 content or request forms it selects Compact and for more it automatically selects Detailed. • Compact: Card details displayed with a brief detail without any card content visible. • Detailed: Card content or the request forms are visible as selected in the Topic Card Content Limit.
Card Limit	Number of cards to display on the widget.
Topic Card Content Limit	Number of card content to display on a card. The options are None, 2, and 3 . The default value is 3.
Load Configuration	The following options are available: <ul style="list-style-type: none"> • Asynchronous • Synchronous

Employee Slate for Moveworks configuration menu

Navigation sections available on the Employee Slate for Moveworks Configuration Summary page, and what each section contains.

Employee Slate for Moveworks configuration form

Field	Description
Configuration Summary	Overview of the overall setup status, showing the percentage of sections completed and a progress card for each configuration section.
Appearance	Parent section for visual configuration settings. Contains the Branding and theming subsection.
Branding and theming	Settings for the portal's visual identity, including colors, logos, and theme options.
Conversational assistant	Parent section for connecting a conversational assistant to the portal. Contains the Moveworks setup subsection.
Moveworks setup	Settings for integrating the Moveworks conversational assistant with the portal, including connection and authentication details.
Tasks and requests	Parent section for configuring employee self-service interactions. Contains the Tasks, Requests, and AI preferences subsections.
Tasks	Settings for the tasks available to employees through the portal.
Requests	Settings for the request catalog items available to employees through the portal.
AI preferences	Settings that control how AI-assisted features behave within tasks and requests.

Employee Slate for Moveworks configuration form (continued)

Field	Description
Canvas	Parent section for configuring the portal layout. Contains the Canvas configuration and Widget library subsections.
Canvas configuration	Settings for the layout and structure of the portal canvas, including page arrangement and display options.
Widget library	Collection of available widgets that can be added to the canvas to extend portal functionality.
Documentation	Parent section for reference materials. Contains the Documentation and references subsection.
Documentation and references	Links to supporting documentation and reference materials for the Employee Slate for Moveworks configuration.

Employee Slate for Now Assist configuration menu

Navigation sections available on the Employee Slate for Now Assist configuration summary page, and what each section contains.

Employee Slate for Now Assist configuration form

Field	Description
Configuration Summary	Overview of the overall setup status, showing the percentage of sections completed and a progress card for each configuration section. Changes are recorded automatically.
Appearance	Parent section for visual configuration settings. Contains the Branding and theming subsection.
Branding and theming	Settings for the portal's visual identity, including colors, logos, and theme options.
Data sources	Parent section for connecting content sources to the portal. Contains the Internal sources and External sources subsections.
Internal sources	Settings for connecting internal data sources, such as knowledge bases and service catalog items, to the portal.
External sources	Settings for connecting external data sources to the portal to surface content from outside the instance.
Conversational assistant	Parent section for connecting a conversational assistant to the portal. Contains the Now Assist setup subsection.
Now Assist setup	Settings for integrating the Now Assist conversational assistant with the portal.
Tasks and requests	Parent section for configuring employee self-service interactions. Contains the Tasks, Requests, and AI preferences subsections.
Tasks	Settings for the tasks available to employees through the portal.
Requests	Settings for the request catalog items available to employees through the portal.

Employee Slate for Now Assist configuration form (continued)

Field	Description
AI preferences	Settings that control how AI-assisted features behave within tasks and requests.
Canvas	Parent section for configuring the portal layout. Contains the Canvas configuration and Widget library subsections.
Canvas configuration	Settings for the layout and structure of the portal canvas, including page arrangement and display options.
Widget library	Collection of available widgets that can be added to the canvas to extend portal functionality.
Documentation	Parent section for reference materials. Contains the Documentation and references subsection.
Documentation and references	Links to supporting documentation and reference materials for the Employee Slate for Now Assist configuration.

Assignment rule form

Field descriptions for the Edit assignment rule form, used to define when and how tasks are assigned to a group or user in Core Business Suite.

Edit assignment rule form

Field	Description
Name	Name of the assignment rule. For example, <code>HR General Case</code> .
Execution order	Numeric value that determines the order in which this rule runs relative to other assignment rules. Lower values run first.
Set to active	When selected, the assignment rule is active and applied to incoming tasks.
When to assign	
Table	Table that the assignment rule applies to. For example, <code>HR Case</code> .
Show labels	When enabled, displays field labels in the condition builder.
Field	Field on the selected table used to evaluate the assignment condition. For example, <code>Assigned to</code> .
Operator	Comparison operator applied to the selected field. For example, <code>Is empty</code> .
AND/OR	Toggle that controls how multiple conditions are combined. Select AND to require all conditions to be met, or OR to require any one condition to be met.
Who to assign	
Group	Group to assign the task to when the assignment conditions are met. For example, <code>HR Request managers</code> .
User	User to assign the task to when the assignment conditions are met. Can be used with or without a group assignment.

CBS Client Role Rule form

Field descriptions for the CBS Client Role Rule form, used to define the conditions that determine how the CBS requester role is assigned to employees.

CBS Client Role Rule form

Field	Description
Name	Name of the role rule.
Active	When selected, the role rule is active and applied to determine requester role assignment. This check box is selected by default.
Table	Table that the role rule applies to. This field is automatically set to User [sys_user].
Condition	Filter conditions that determine which employees receive the CBS requester role. Use Add Filter Condition to add a condition, or Add OR Clause to add an alternative condition set.

Create group form

Create custom groups for Core Business Suite functions by filling in the form fields.

Field descriptions

The following table describes the fields on the Create group form.

Create group form

Field	Description
Group name	Name of the group. This field is mandatory.
Group manager	User responsible for managing the group.
Group description	Description of the group purpose and function. This field is mandatory.
Assign people to this group	Users to add as members of the group.
Assign role	Role to assign to all members of the group.

Edit Knowledge Base form

Edit any Knowledge Base settings by filling in the form fields to define workflows, ownership, and management. You can apply separate settings for different Knowledge bases across your organization.

Edit knowledge base form

Field	Description
Title	Name of the Knowledge Base.
Description	Brief description of the Knowledge Base purpose.
Publish flow	Workflow for publishing knowledge articles.

Edit knowledge base form (continued)

Field	Description
Retire flow	Workflow for retiring knowledge articles.
Owner	User who owns the Knowledge Base. Note: You can add an owner of the Knowledge Base by adding them to the Owner field beyond the CBS admin.
Managers	Users who can manage the Knowledge Base. Note: You can add additional people who can manage the Knowledge Base by adding them to the Manager field, beyond the CBS admin.
Active	Selected when the Knowledge Base is active.

Create New Knowledge Base form

Describe the fields on the Create New Knowledge Base form to configure knowledge base settings.

Create New Knowledge Base form

Field	Description
Knowledge Base	Name of the knowledge base.
Disable commenting	Option to prevent users from adding comments to knowledge articles.
Disable suggesting	Option to prevent users from suggesting knowledge articles.
Disable category editing	Option to prevent users from editing knowledge article categories.
Disable rating	Option to prevent users from rating knowledge articles.
Disable mark as helpful	Option to prevent users from marking knowledge articles as helpful.
Publish flow	Workflow for publishing knowledge articles.
Retire flow	Workflow for retiring knowledge articles.
Active	Option to make the knowledge base active.
Checklist	Checklist associated with the knowledge base.
Description	Brief description of the knowledge base purpose.
Set default knowledge field values	Default field values for knowledge articles in this knowledge base.
Release version	Version number for the knowledge base release.
Attachment	Placeholder to add a the knowledge base file.

CBS Knowledge Authors form

Field descriptions for the CBS Knowledge Authors form.

CBS Knowledge Authors form

Field	Description
Name	Name of the user criteria.
Short Description	Brief description of the user criteria.
Active	Selected when the user criteria is active.
Application	Application scope for the user criteria.
Users	Specific users who can contribute to the knowledge base.
Groups	Groups whose members can contribute to the knowledge base.
Roles	Roles that grant permission to contribute to the knowledge base.
Companies	Companies whose users can contribute to the knowledge base.
Locations	Locations whose users can contribute to the knowledge base.
Departments	Departments whose users can contribute to the knowledge base.
Advanced	Selected to enable advanced scripting options.
Match All	Selected when users must match all specified criteria.
Script	Custom script to determine user eligibility. This field appears only when the Advanced check box is selected.

CBS Knowledge Readers form

Field descriptions for the CBS Knowledge Readers form.

CBS Knowledge Readers form

Field	Description
Name	Name of the user criteria.
Short Description	Brief description of the user criteria.
Active	Selected when the user criteria is active.
Application	Application scope for the user criteria.
Users	Specific users who can read the knowledge base.
Groups	Groups whose members can read the knowledge base.
Roles	Roles that grant permission to read the knowledge base.
Companies	Companies whose users can read the knowledge base.
Locations	Locations whose users can read the knowledge base.
Departments	Departments whose users can read the knowledge base.
Advanced	Selected to enable advanced scripting options.
Match All	Selected when users must match all specified criteria.
Script	Custom script to determine user eligibility. This field appears only when the Advanced check box is selected.