Zurich Core Business Suite

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Table of Contents

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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 fulfills different business needs, for different personas, within a single product suite.

https://player.vimeo.com/video/1169998761?h=6b65306fba&badge=0&autopause=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.

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

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.

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servicenow.

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.
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 Configure Core Business Suite applications.	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]

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CBS benefits (continued)

Benefit	Feature	Users
• 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. **Note:** You can access any existing Quick links from your Employee Center portal, if you're already a user, on the CBS employee portal.	Quick links	• 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:

- Configuring Core Business Suite
- 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.

HR Service Delivery	Workplace Service Delivery	Legal Service Delivery
Learn more about HR Service Delivery to ensure delivery of timely employee assistance.	Learn more about Workplace Service Delivery to manage workplace-related tasks and requests in one place.	Learn more about Legal Service Delivery that enables employees and legal support to manage legal requests.

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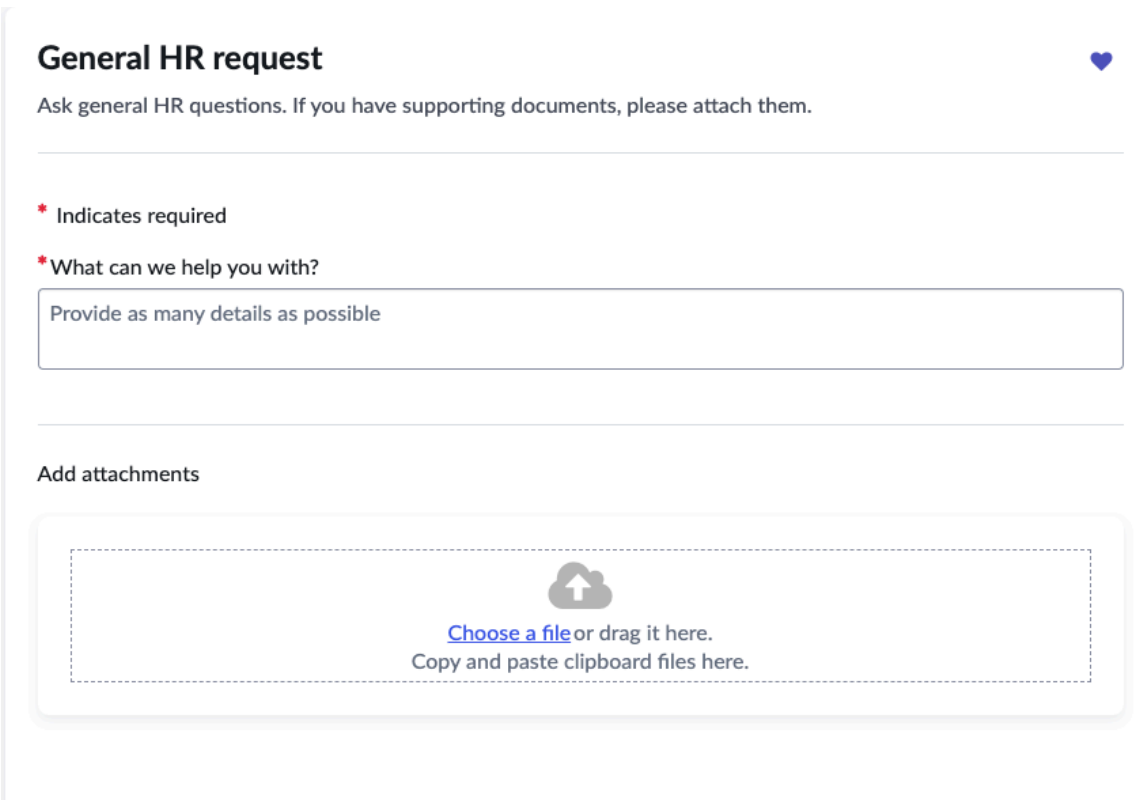
Health and Safety	Finance and Supply Chain applications	Sourcing and Procurement Operations
Learn more about creating safe and healthy working conditions for your employees.	Learn more about the finance and supply chain applications that enables employees and finance teams to manage finance-related requests.	Learn more about the sourcing and procurement operations to enable your employees to shop for goods and services at work with AI-assisted tools.

Find a breakdown of the supported features in CBS within the mentioned applications.

HR requests



Raise a request for any query or issue as a general HR request on CBS. For more information, Raise HR requests.

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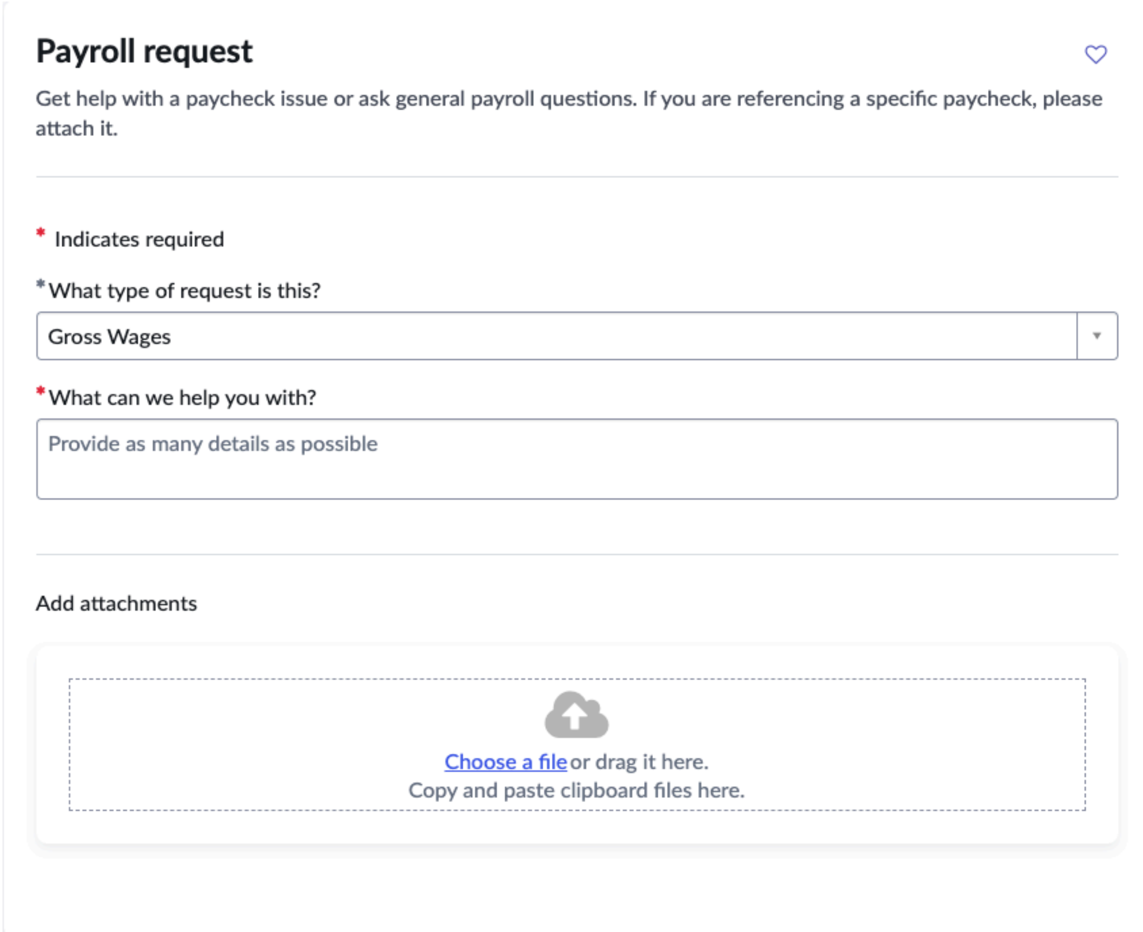


Payroll request

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

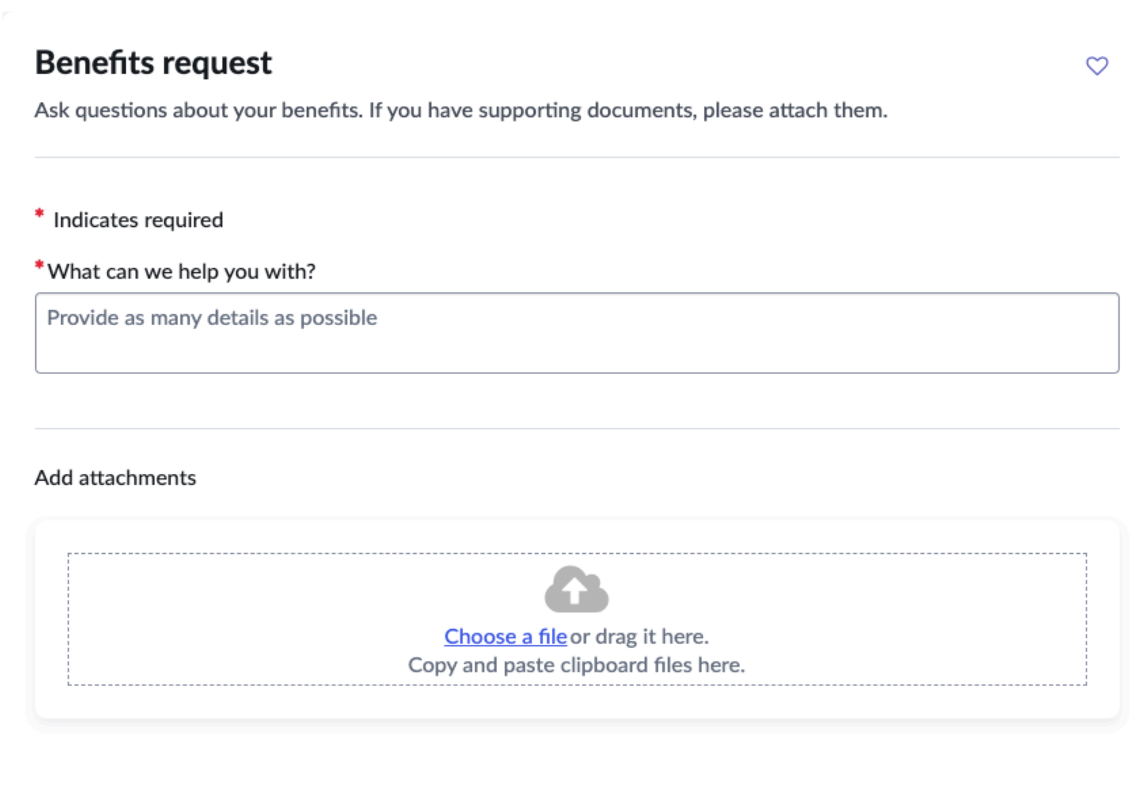
*What can we help you with?

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.

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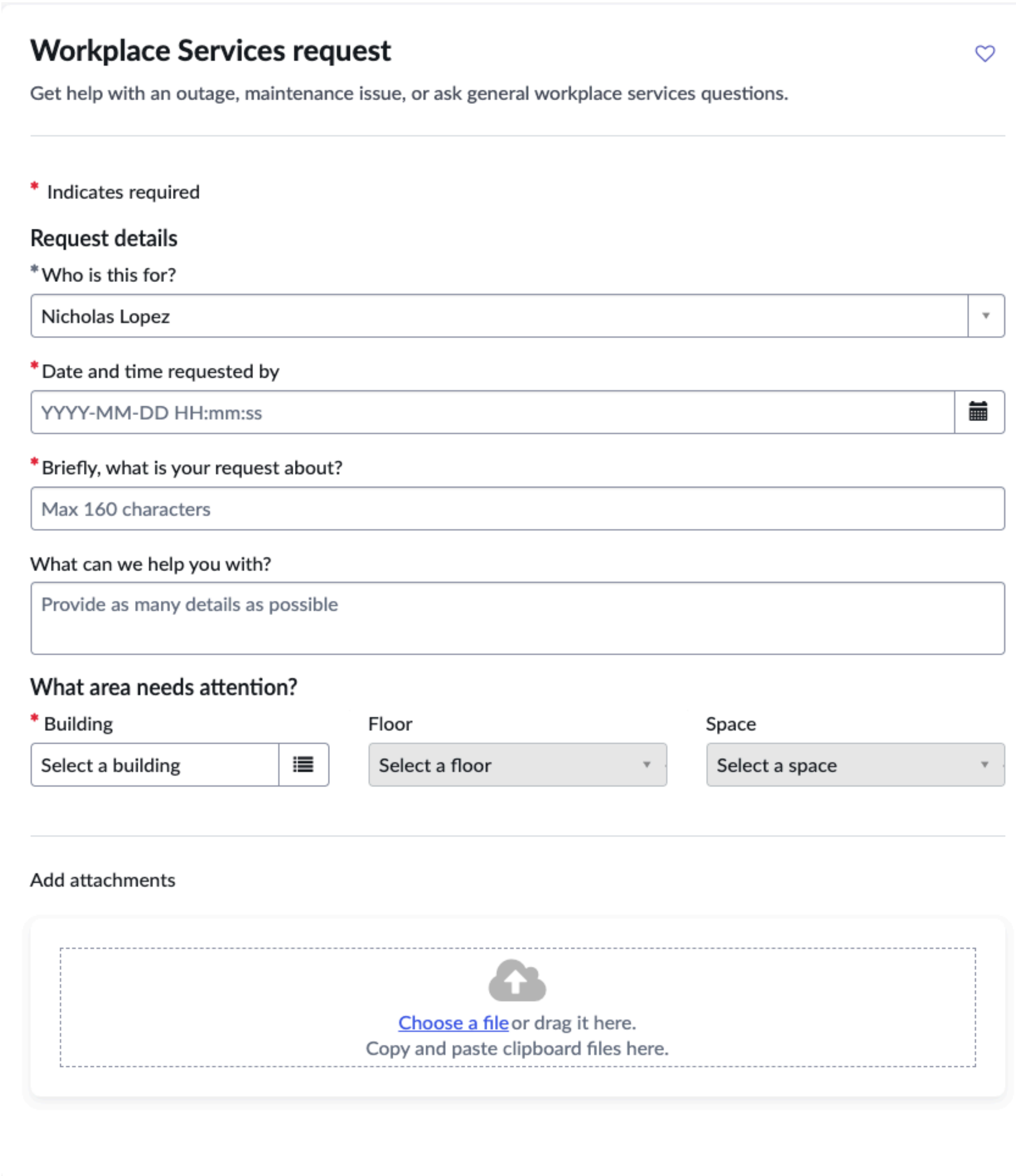
Ask an HR benefit questions as an employee. For more information, see Raise HR requests.

Workplace requests



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.

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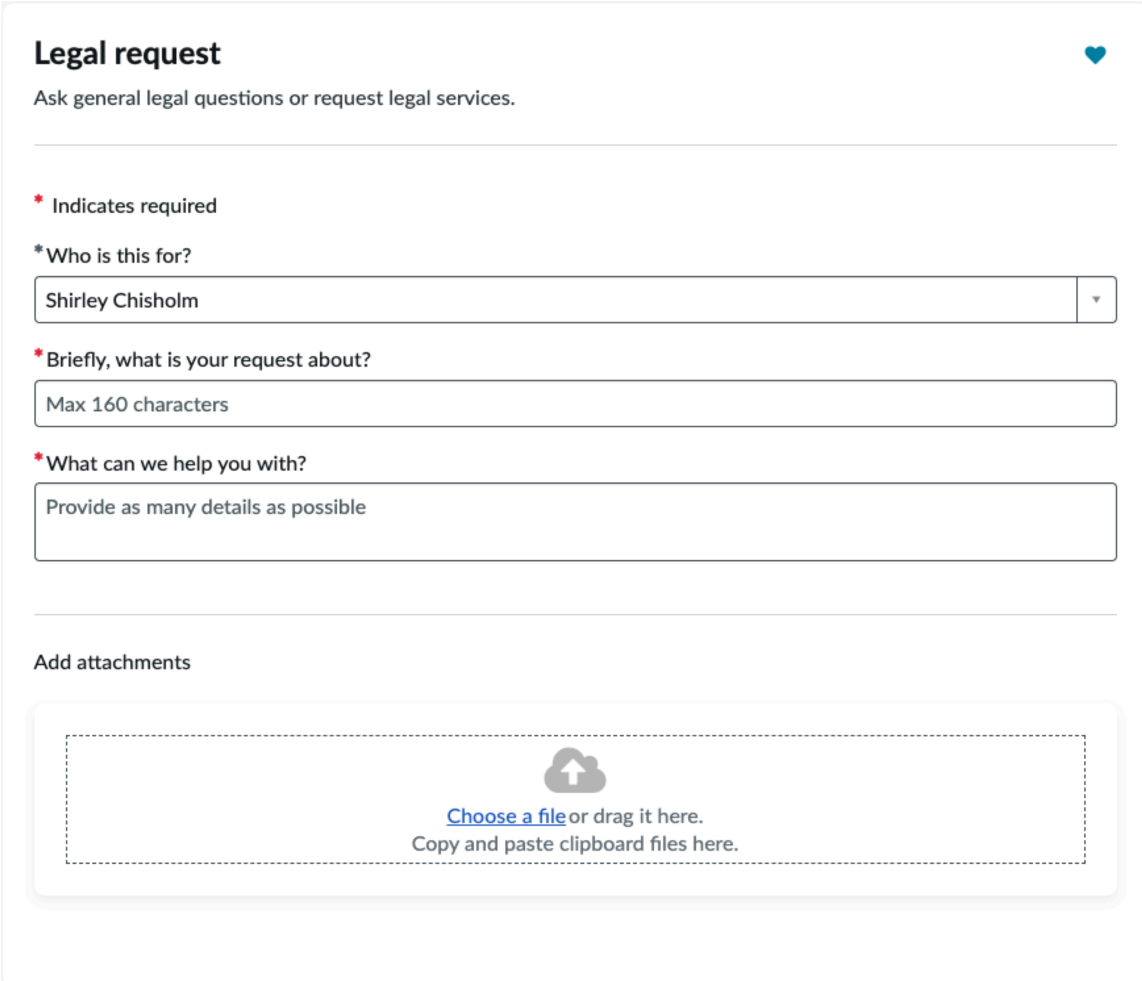
Legal requests



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.

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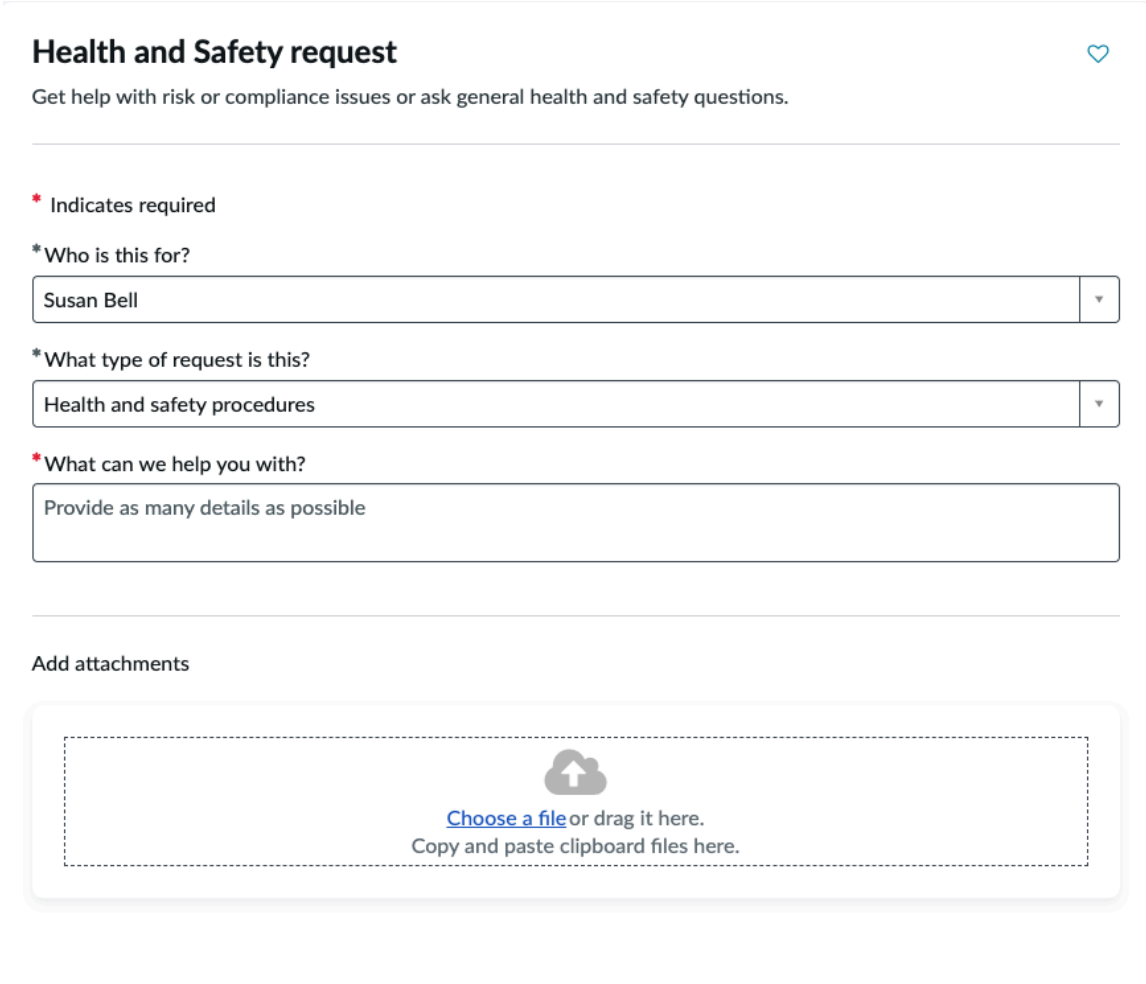
Health and Safety requests



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.

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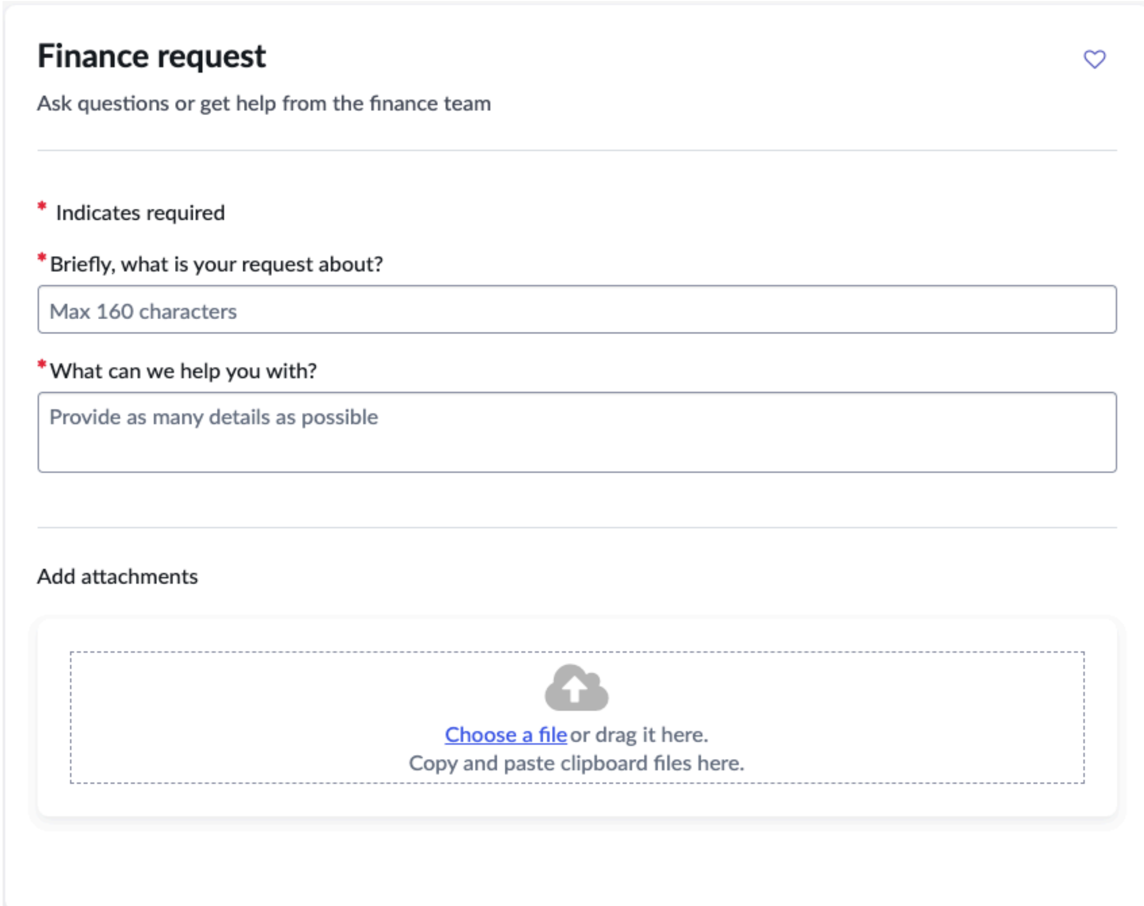
Finance-related requests



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.

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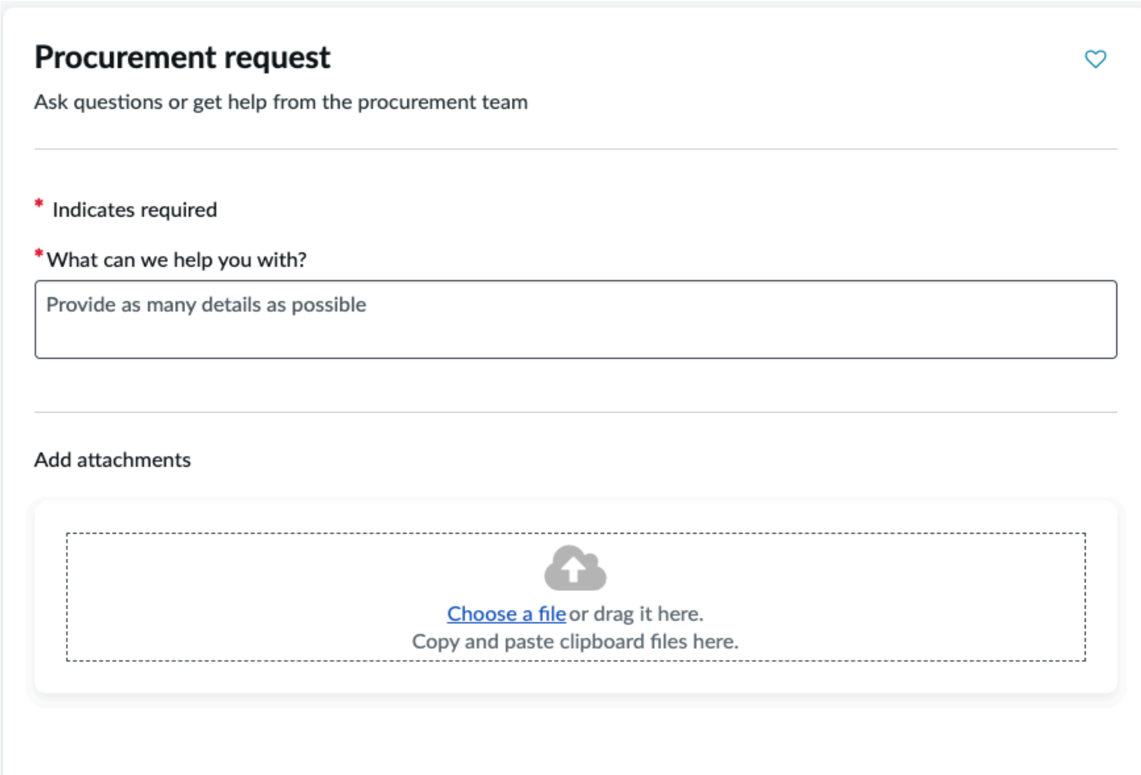
Procurement requests



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

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.

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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.
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:

- Configuring Core Business Suite
- 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.

Supplier Lifecycle Operations	Accounts Payable Operations
Learn more about Supplier Lifecycle Operations to create collaboration with suppliers, mitigate risks, and monitor compliance and performance.	Learn more about Accounts Payable Operations to manage invoices, invoice exceptions, approvals, and supplier inquiries.

Find a breakdown of the supported features in CBS within the mentioned applications.

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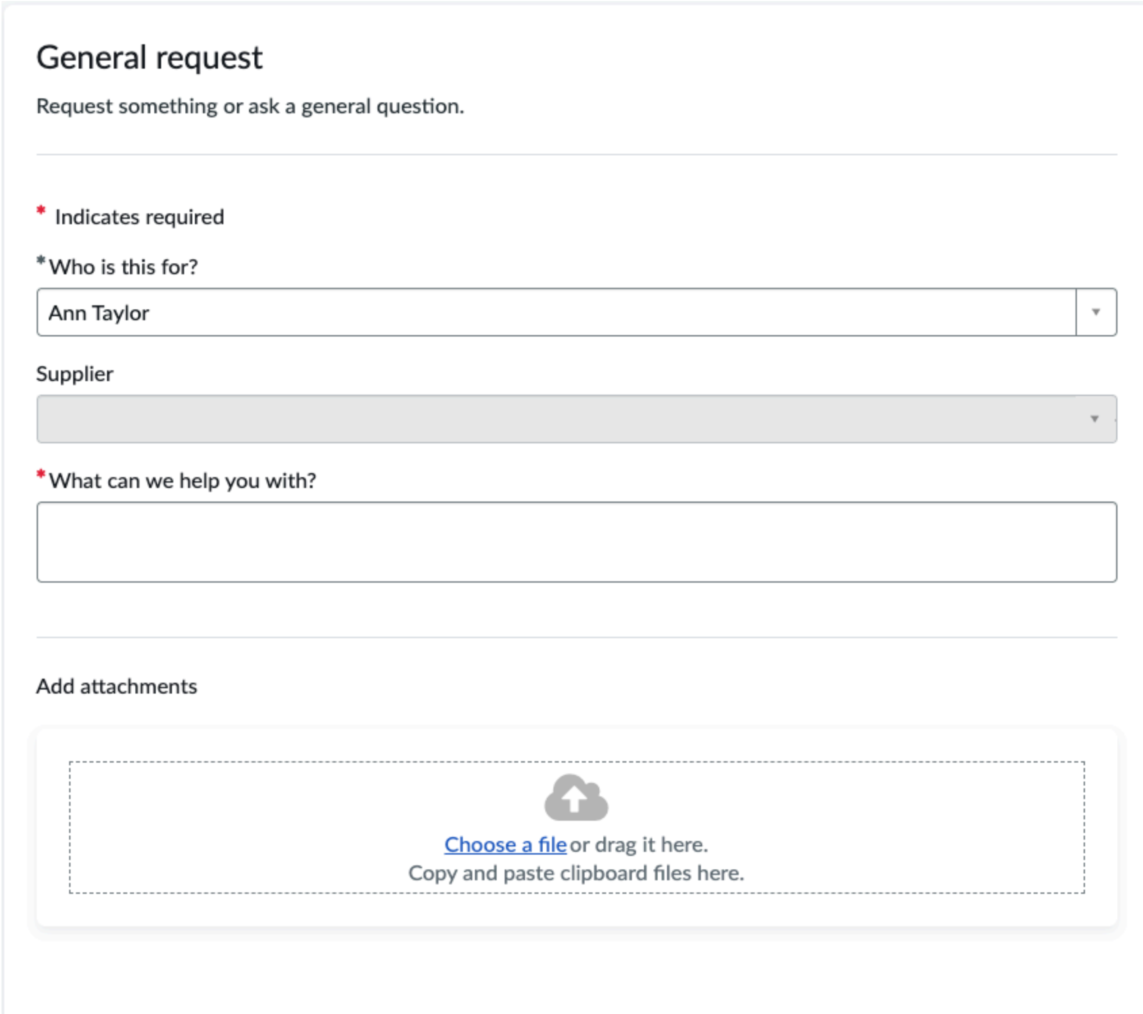
Supplier lifecycle requests



Ask a general category question, using the supplier catalog. For more information, Raise a general supplier request.

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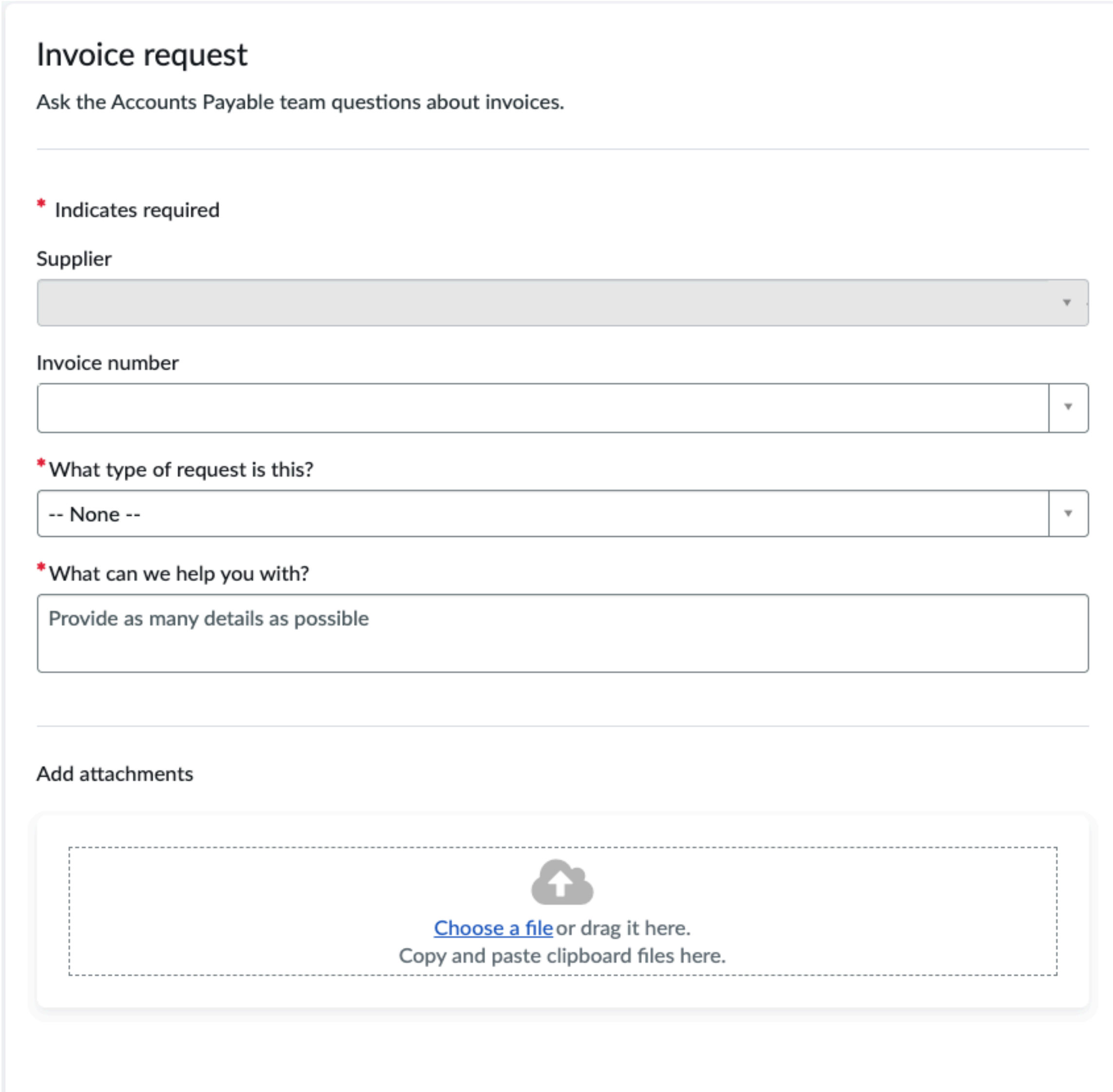
Accounts Payable requests



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

Configuring Core Business Suite

Install and configure Core Business Suite to streamline employee and supplier requests. Core Business Suite enables efficient intake and resolution of inquiries across different parts of your organization such as Legal, Human Resources, Workplace Services, Health and Safety, Procurement, Finance, Supplier Lifecycle Operations, and Accounts Payable Operations.

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Configuration overview

Complete the following tasks in the order listed to install and use the Core Business Suite application.

1. Install Core Business Suite.

   Install the Core Business Suite set of applications to streamline core business workflows across parts of your organization such as Legal, Human Resources, Workplace Services, Health and Safety, Procurement, Finance, Supplier Lifecycle Operations, and Accounts Payable Operations.

2. Installing Core Business Suite applications.

   Install Core Business Suite applications to be able to submit inquiries, create and track requests, and manage workflows. These applications support departments such as Legal, Human Resources, Workplace Services, Health and Safety, Procurement, Finance, Supplier Lifecycle Operations, and Accounts Payable Operations.

3. Import Core Business Suite configuration files.

   Import the Core Business Suite configuration files into your instance to access and run the scheduled jobs required for configuring Core Business Suite applications.

4. Configure Core Business Suite applications.

   Configure Core Business Suite applications by running scheduled jobs that initialize all required workflows and apply settings.

5. Assign a Core Business Suite admin role to a user.

   Grant administrative permissions for the Core Business Suite application and provide full access to configure its underlying services by assigning users a Core Business Suite admin role.

Depending on your setup, you might need to configure the instance options for the Help topics widget on the CBS employee portal. For more information, see Configure instance options for Help topics widget.

Install Core Business Suite

Install the Core Business Suite set of applications to streamline core business workflows across parts of your organization such as Legal, Human Resources, Workplace Services, Health and Safety, Procurement, Finance, Supplier Lifecycle Operations, and Accounts Payable Operations.

Before you begin

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 this feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task

The following items are installed with Core Business Suite:

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- Dependent store applications
- Roles

For more information, see Components installed with Core Business Suite.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Core Business Suite (sn_cbs) 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. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. 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

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

Installing Core Business Suite applications

Install Core Business Suite applications to be able to submit inquiries, create and track requests, and manage workflows. These applications support departments such as Legal, Human Resources, Workplace Services, Health and Safety, Procurement, Finance, Supplier Lifecycle Operations, and Accounts Payable Operations.

Core Business Suite provides applications for various parts of your organization. You can install any or all of them.

Verify that the listed plugins are installed. If they aren't, install them individually using the standard installation process.

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Core Business Suite applications and plugins

Application	Description	Plugins
Legal services	Submit and manage general legal requests. See Install Legal Request Management.	• Legal Request Management application (sn_lg_ops) • Legal Counsel Center application (sn_lg_cf_workspace)
Human Resources (HR) services	Manage payroll inquiries, benefits questions, and general HR requests. See Activate Case and Knowledge Management.	• Human Resources Scoped App: Core (com.sn_hr_core) • Agent Workspace for HR Case Management (sn_hr_agent_ws) • Advanced Work Assignment for HRSD (com.sn_hr_awa) • Document Templates (sn_doc) • HR Taxonomy (sn_hr_emp_taxonomy) • Human Resources Scoped App (sn_hr_pa)
Workplace Services Delivery	Handle general service requests and managing space arrangements efficiently.See Install Workplace Case Management.	• Workplace Core (sn_wsd_core) • Workplace Case Management (sn_wsd_case) • Workplace Agent for mobile (sn_wsd_agent_mob) • Workplace Central (sn_wsd_central)
Health and Safety services	Enable employees to make health and safety related inquiries. See Install Health and Safety Risk Management.	• Health and Safety Core (sn_ohs_im) • Health and Safety Case (sn_hs_cm)
Procurement services	Enable employees to make procurement related inquiries. See Install Sourcing and Procurement Operations.	• Common Service Delivery (sn_spend_sdc) • Supplier Common Architecture (sn_slm) • Finance Common Architecture (sn_fin)

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Core Business Suite applications and plugins (continued)

Application	Description	Plugins
		• Source-to-Pay Workspace (sn_spend_workspace) • Procurement Case Management (sn_spend_psd) • Supplier Case Management (sn_supplier_mgmt)
Finance services	Enable employees to make finance related inquiries. See Install Finance Case Management.	• Finance Case Management (sn_fin_ops) • Finance Common Architecture (sn_fin) installed with (sn_fin_ops) • Common Service Delivery (sn_spend_sdc) installed with (sn_fin_ops) • Finance Operations Workspace (sn_fin_ops_ws) installed with (sn_fin_ops) • Source-to-Pay Common Architecture (sn_shop) • Advanced Work Assignment for Source-to-Pay Operations (sn_spend_awa)
Supplier Lifecycle Operations	Streamline procurement, supplier, and invoice requests from submission to fulfillment. See Install Supplier Case Management.	• Supplier Case Management (sn_supplier_mgmt) • Supplier Common Architecture (sn_slm) • Source to Pay Workspace (sn_spend_workspace) • Supplier Collaboration Portal (sn_supplier_sp)
Accounts Payable Operations	Enable suppliers to view purchase orders, invoices, and inquiry cases, and submit invoice-related questions. See Install Accounts Payable Invoice Processing.	• Invoice Case Management (sn_ap_cm) • Source-to-Pay Common Architecture (sn_shop) • Finance Common Architecture (sn_fin_ops) • Common Service Delivery (sn_spend_sdc)

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Core Business Suite applications and plugins (continued)

Application	Description	Plugins
		• Source to Pay Workspace (sn_spend_workspace) • Supplier Collaboration Portal (sn_supplier_sp)

What to do next:

Import Core Business Suite configuration files. For more information, see Import Core Business Suite configuration files.

Import Core Business Suite configuration files

Import the Core Business Suite configuration files into your instance to access and run the scheduled jobs required for configuring Core Business Suite applications.

Before you begin
Role required: admin

Procedure

1. Visit the ServiceNow Store website, and search for and select the Core Business Suite application.
2. In the Supporting Links and Docs section, download the following Core Business Suite configuration files:
   - Core Business Suite Admin Setup (Update set)
   - CBS - HR Core Records Deactivator (Schedule job)
   - CBS - HR Integrations Records Deactivator (Schedule job)
   - CBS - Bulk HR RCA Approval (Schedule job)

   Note:
   If you can't find the XML files, select **Show more** to view the list of supporting links and docs.
3. Import the required update sets.
   a. Navigate to **All** > **System Update Sets** > **Update Sets to Commit**.
   b. Under Related Links, select **Import Update Set from XML**.
   c. Select **Choose file**.
   d. Browse for the `Core Business Suite Admin Setup` update set file and select it.
   e. Select **Upload**.
   The `Core Business Suite Admin Setup` update set file uploads.

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f. If the Retrieved Update Sets page does not open automatically, navigate to **All** > **System Update Sets** > **Retrieved Update Sets**.

g. Select the **Core Business Suite Admin Setup** update set file from the list.

h. Select **Preview Update Set**.

i. Select **Commit Update Set**.
Once the commit is successful, the Core Business Suite Admin Setup status changes from Loaded to Committed.

The `Core Business Suite Admin Setup` update set file is imported into your instance. This update set includes the following scheduled jobs:

- Setup Core Business Suite for Employee Center
- Add topic to taxonomy
- Setup Core business suite Taxonomy for Employee Center
- Sync Advanced Navigation for Core Business Suite
- Update service records for the Core Business Suite

4. Import scheduled jobs.

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

b. Right-click the **Name** column and select **Import XML**.

c. Select **Choose file**.

d. Browse for the *`CBS - HR Core Records Deactivator`* scheduled job file and select it.

e. Select **Upload**.

f. Repeat the steps to upload the remaining scheduled jobs:

- CBS - HR Integrations Records Deactivator
- CBS - Bulk HR RCA Approval

What to do next
Run the scheduled jobs to configure the Core Business Suite applications. For more information, see Configure Core Business Suite applications.

Configure Core Business Suite applications

Configure Core Business Suite applications by running scheduled jobs that initialize all required workflows and apply settings.

Before you begin
Role required: admin

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Procedure

1. Assign the CBS requester role to all the active employees in the system by running the *`CBS - Add Requestor Role to Users`* scheduled job.

   Note:
   Run this scheduled job once during the initial Core Business Suite setup. You do not need to run it again after installing Core Business Suite applications.

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

   b. Search for and select **CBS - Add Requestor Role to Users**.

   c. On the CBS - Add Requestor Role to Users page, select **Execute Now**.

2. Activate Core Business Suite records by running the *`Update service records for the Core Business Suite`* scheduled job.
   Core Business Suite records include:

   - EC Portal notifications
   - Workspace notifications
   - Email notifications
   - Record producers
   - System properties

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

   b. Search for and select **Update service records for the Core Business Suite**.

   c. Prepare and execute the scheduled job from the Update service records for the Core Business Suite page.

      Note:
      Run this scheduled job only for newly installed services that aren't yet running. Running it on active services overwrites existing records and recent changes.

Number of applications installed	Action
All Core Business Suite applications	Select **Execute Now**.
One or more Core Business Suite applications	i. Modify the business units (BUs) list in the BUList variable in the script to include only the BUs that are installed. **Note:** You must provide the BU names in the BUList exactly as specified in the script. Valid BU names are: 'LEGAL', 'HR', 'HEALTH', 'WSD', 'FCM', 'APO', 'SPO', and 'SLO'. Incorrect names will cause errors. ii. Select **Execute Now**.

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3. Set up a taxonomy for Core Business Suite in the Employee Center portal by running the *`Setup Core business suite Taxonomy for Employee Center`* scheduled job.

Note:
Run this job once to set up the taxonomy in the Employee Center portal during the initial Core Business Suite setup.

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

b. Search for and select *`Setup Core business suite Taxonomy for Employee Center`*.

c. Determine the taxonomy you want to use.

- Create a new taxonomy - `Core Business Suite Employee`
- Use the taxonomy already configured and in use in the Employee Center Portal and merging information from the `Core Business Suite Employee - Default` taxonomy provided with Core Business Suite application
- Use the `Core Business Suite Employee - Default` taxonomy provided with Core Business Suite application

Taxonomy to use	Action
A new `Core Business Suite Employee` taxonomy for Core Business Suite created by merging topics from the taxonomy already configured in the Employee Center portal and the `Core Business Suite Employee - Default` taxonomy provided with Core Business Suite application.	On the Setup Core business suite Taxonomy for Employee Center page, select **Execute Now**.
The existing taxonomy that is already configured in the Employee Center portal by merging topics from the `Core Business Suite Employee - Default` taxonomy without creating a new taxonomy.	**i.** On the Setup Core business suite Taxonomy for Employee Center page, update the variable `createNewTaxonomy` to `false` in the script. **ii.** Select **Execute Now**.
The `Core Business Suite Employee - Default` taxonomy provided with the Core Business Suite application.	**i.** Navigate to **All** > **Service Portal** > **Portals**. **ii.** Search for and select **Employee Center**. **iii.** In the **Employee Center** page, select the **Taxonomy** tab. **iv.** If a message appears about the application scope, select **here** to be able to edit the record. **v.** Select **Edit**. **vi.** If you have an existing taxonomy, select and remove it.

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Taxonomy to use	Action
	vii. Add **Core Business Suite Employee – Default** taxonomy to the **Taxonomy** list. viii. Select **Save**.

4. Add the created taxonomy `Core Business Suite Employee` to the Employee Center portal to enable organizing the Core Business Suite content.

   Note:
   Run this job only when you create a new taxonomy.

   a. Navigate to **All** > **Service Portal** > **Portals**.
   b. Search for and select **Employee Center**.
   c. On the **Employee Center** page, select the **Taxonomy** tab.
   d. If a message appears about the application scope, select **here** to be able to edit the record.
   e. Select **Edit**.
   f. If you have an existing taxonomy, select and remove it.
   g. Add the newly created taxonomy **Core Business Suite Employee** to the **Taxonomy** list.
   h. Select **Save**.
5. Set up an Employee Center portal with a new Core Business Suite home page setup, Advanced Portal Navigation (APN), employee profiles, and quick links by running the *`Setup Core Business Suite for Employee Center`* scheduled job.

   For information about Core Business Suite home page setup, Advanced Portal Navigation (APN), employee profiles, and quick links, see Exploring employee support.

   Warning:
   You must run this *`Setup Core Business Suite for Employee Center`* scheduled job only after adding the newly created taxonomy `Core Business Suite Employee` to the Employee Center portal. Running this scheduled job prior to adding the taxonomy will result in an incorrect Advanced Portal Navigation (APN) setup.

   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Search for and select **Setup Core Business Suite for Employee Center**.
   c. In the **Setup Core Business Suite for Employee Center** page, select **Execute Now**.
6. Add newly installed Core Business Suite applications to the taxonomy by running the *`Add topic to taxonomy`* scheduled job.

   Note:
   Run this scheduled job only for newly installed Core Business Suite applications that aren't yet running. Running it on active applications overwrites existing records and recent changes.

   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Search for and select **Add topic to taxonomy**.
   c. Modify the business units (BUs) list in the BUList variable in the script to include only the BUs that are installed.

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Note:
You must provide the BU names in the BUList exactly as specified in the script. Valid BU names are: 'LEGAL', 'HR', 'HEALTH', 'WSD', 'FCM', 'APO', 'SPO', and 'SLO'. Incorrect names will cause errors.

d. Select **Execute Now**.

7. Add and synchronize the topics and items from newly installed Core Business Suite application with the Employee Center portal by running the `Sync Advanced Navigation for Core Business Suite` scheduled job.

   Note:
   Run this job whenever you install a new Core Business Suite application.

   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Search for and select **Sync Advanced Navigation for Core Business Suite**.
   c. Select **Execute Now**.
8. **Optional:** Check the status of the executed scheduled jobs.
   a. Navigate to **All** > **System Log** > **All**.
   b. On the **Log** page, search for messages with the prefix `Core Business Suite Setup`.

Configure the Core Business Suite Human Resources

If your instance is running on Zurich patch 5 or older versions, configure the Human Resources (HR) application by running scheduled jobs that initialize all required workflows and apply settings to manage payroll inquiries, benefits questions, and general HR requests.

Before you begin

Configure the Core Business Suite with scheduled jobs that initialize the required workflows and apply settings for all Core Business Suite applications, including Human Resources (HR). For more information, see Configure Core Business Suite applications.

Role required: admin

Procedure

1. In your ServiceNow instance, set the application scope to Human Resources (HR).
   a. Select the Application scope icon ().
   b. In the filter navigator, search for and select **Human Resources (HR)**.
2. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
3. Search for and select each scheduled job.
   - `CBS - HR Core Records Deactivator` - Deactivates HR core records that aren't included in the Core Business Suite, such as HR emails, HR record producers, and HR services.
   - `CBS - HR Integrations Records Deactivator` - Deactivate HR integrations records that aren't included in the Core Business Suite, such as HR emails, HR record producers, and HR services.
   - `CBS – Bulk HR RCA Approval` - Enables approval for the restricted caller access (RCA) records generated by Core Business Suite.

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4. In each scheduled job record, select **Execute Now**.
5. **Optional:** Check the status of the executed scheduled jobs.
   a. Navigate to **All** > **System Log** > **All**.
   b. On the **Log** page, search for messages with the prefix `Core Business Suite Setup`.

Assign a Core Business Suite admin role to a user

Grant administrative permissions for the Core Business Suite application and provide full access to configure its underlying services by assigning users a Core Business Suite admin role.

Before you begin

Ensure that a user record exists for the user to whom you want to add the role. For information about how to add a new user, see Create a user.

Role required: admin

Procedure

1. Navigate to **All** > **Organization** > **Users**.
2. Search for and select the user from the user list.
3. In the selected **User** record, select the **Roles** tab.
4. Select **Edit**.
5. In the **Collection** list, search for and select the sn_cbs_admin role.
6. Add the user to the **Roles** list by selecting the right arrow.
7. Select **Save**.

Result

The user is assigned the CBS admin role and can perform administrative tasks in the Core Business Suite applications.

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.

Using Core Business Suite

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

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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.

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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?	The following are the options available: ◦ **None** ◦ **Payment inquiry** ◦ **Invoice inquiry**

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Field	Description
	◦ **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, 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 Notification configurations.

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 Getting notifications in workspace.

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.

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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.	• ESC Admin & Taxonomy admin • Human Resources (sn_hr_core.admin) • Workplace Services Delivery (sn_wsd_core.workplace_admin) • Legal (sn_lg_ops.legal_admin) • 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.	• Human Resources (sn_hr_core.hrsm_employee) • Legal (sn_lg_ops.legal_user) • Workplace Services Delivery (sn_wsd_core.workplace_user)

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Roles installed with Core Business Suite (continued)

Role title [name]	Description	Contains roles
		• 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
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

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:

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Instance options form (continued)

Field	Description
	• **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: • **Asynchronous** • **Synchronous**

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