servicenow®

Asset Management

Last updated: 10/08/2026

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Some examples and graphics depicted herein are provided for illustration only. No real association or connection to ServiceNow products or services is intended or should be inferred.

ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company and product names may be trademarks of the respective companies with which they are associated.

Please read the ServiceNow Website Terms of Use at www.servicenow.com/terms-of-use.html

Company Headquarters
2225 Lawson Lane
Santa Clara, CA 95054
United States
(408) 501-8550

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table of Contents

Asset Management **4**
- IT Asset Management 8
  - Software Asset Management 12
  - Hardware Asset Management 1242
  - Cloud Cost Management 1706
  - Asset Audit Response 1940
  - IT Asset Management content request process 1955
- Enterprise Asset Management 1956
  - Explore 1958
  - Configure 2009
  - Managing enterprise models and assets 2060
  - Managing enterprise asset inventory and contracts 2170
  - Manage work orders for your enterprise assets 2270
  - Using Service Catalog for Enterprise Asset Management requests and flows 2309
  - Managing enterprise assets and tasks using the Mobile Agent application 2325
  - Procuring enterprise assets 2372
  - Enterprise Asset Management reference 2373
  - Industry-specific EAM solutions 2427
  - Expanded Model and Asset Classes 2489
- Common applications 2497
  - Base Asset Management 2498
  - Contract Management 2573
  - Procurement 2620
  - Product Catalog 2662

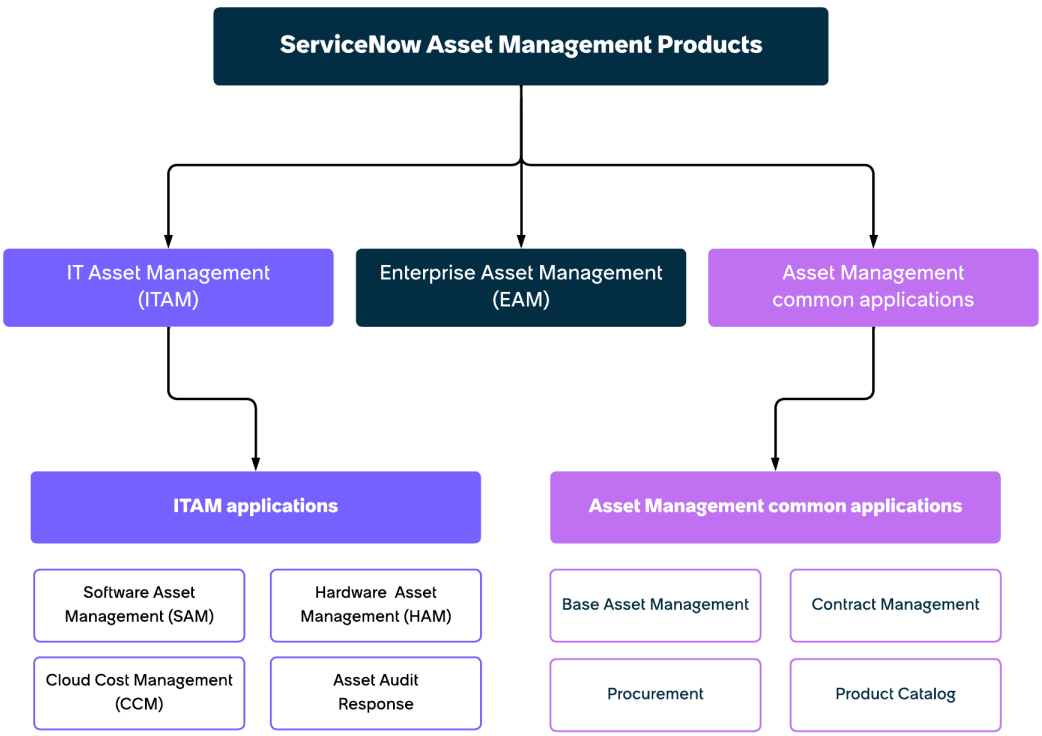
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management

ServiceNow® Asset Management gives organizations complete visibility and control over their technology and enterprise assets throughout their entire lifecycle on a single, unified platform.

Built natively on the ServiceNow AI Platform®, Asset Management brings together IT Asset Management (ITAM) and Enterprise Asset Management (EAM) to help organizations track, manage, and optimize assets across hardware, software, cloud resources, and enterprise environments. By sharing a single data model with IT Service Management (ITSM), Configuration Management Database (CMDB), and Security Operations, it eliminates data silos and enables cross-functional automation across your entire asset estate.

Asset Management product hierarchy



Asset lifecycle

Every asset managed by ServiceNow Asset Management moves through a defined set of lifecycle states. Automated workflows and AI agents drive transitions between states, trigger approvals, and surface optimization opportunities at each stage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management products

The following table provides an overview of each product in the Asset Management suite.

Asset Management products

Product	What it does	Key capabilities
IT Asset Management products		
Software Asset Management	Manage software licenses, ensure compliance, and eliminate risk with real-time entitlement tracking.	• ServiceNow Otto for Software Asset Management (SAM) for Software Asset Management to streamline and automate the software asset management tasks • Software request via service catalog

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management products (continued)

Product	What it does	Key capabilities
		• Discovery, normalization, and inventory coverage • License reclamation and cost optimization • License Compliance and Reconciliation • SaaS license management
Hardware Asset Management	Manage the physical technology assets from the moment a purchase request is raised to the day a device is securely retired ensuring end-to-end visibility.	• ServiceNow Otto for Hardware Asset Management (HAM) for Hardware Asset Management to streamline and automate the hardware asset management tasks • End-to-end lifecycle management • Loss prevention and asset visibility • Automation and guided workflows • Barcode and QR scanning (mobile app) • Security and compliance tracking
Cloud Cost Management	Gain complete visibility and control over your cloud estate and usage.	• Unified multi-cloud spend visibility across Cloud providers, Kubernetes and AI services • Allocate costs to teams with flexible showback and chargeback • Set budgets, track spend, and get automated overage alerts • Automate rightsizing and shutdowns through native change management workflows

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management products (continued)

Product	What it does	Key capabilities
Asset Audit Response	Centralize vendor audit management, automate evidence collection, and reduce financial exposure.	• Prescriptive audit response workflows • Centralized audit workspace with built-in regulatory content • Asset governance workspace for evidence request tracking • Proactive data gap identification and remediation with SME task assignment • Audit trail cataloging and point-in-time reporting for future audits
Enterprise Asset Management		
Enterprise Asset Management	Manage the entire lifecycle of physical and non-IT business assets, including planning, procurement, deployment, maintenance, and disposal, while connecting asset data with financial, risk, and operational teams in real time.	• ServiceNow Otto for Enterprise Asset Management (EAM) for Enterprise Asset Management to streamline and automate the enterprise asset management tasks • Automate the full enterprise asset lifecycle • Schedule and manage maintenance plans to maximize asset uptime • Track total cost of ownership across the entire asset lifecycle • Mitigate risk through asset traceability • Empower field teams with mobile-first asset maintenance

Asset Management common applications

Asset Management works with the following ServiceNow applications to support asset lifecycle management across procurement, finance, and service management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management common applications

Application	Role in IT Asset Management
Base Asset Management	The Asset Management application provides a single system of record for all IT assets, including hardware, software, and cloud assets. It captures and stores key attributes such as asset type, ownership, location, status, and cost. It tracks assets through every stage of their lifecycle, from procurement and deployment to maintenance and retirement, ensuring no asset goes unaccounted for.
Contract Management	The Contract Management application links license and maintenance contracts directly to asset records with automated renewal workflows.
Procurement	The Procurement application automates purchase orders, approvals, and receiving to create asset records on delivery.
Product Catalog	The Product Catalog application standardizes hardware, software, and cloud SKUs used across ITAM with an employee-facing request portal.

Applications and features

- Base Asset Management
- Software Asset Management
- ServiceNow Otto for Software Asset Management (SAM)
- Hardware Asset Management
- ServiceNow Otto for Hardware Asset Management (HAM)
- Enterprise Asset Management
- Cloud Cost Management
- Asset Audit Response
- Contract Management
- Procurement
- Product Catalog
- IT Asset Management content request

IT Asset Management

The ServiceNow® IT Asset Management application gives you a unified view of hardware assets, software licenses, cloud assets, regulatory audits, contracts, and procurements to help reduce costs, maintain compliance, and manage assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

IT Asset Management life cycle stages

Get started

Software Asset Management



Discover, normalize, and optimize your software licenses to reduce spend and maintain compliance across your enterprise.

Hardware Asset Management



Track and manage your organizational assets such as hardware and consumables.

Cloud Cost Management



Optimize your cloud usage and costs for multiple cloud service providers.

Asset Audit Response



Streamline audit risk management with automated evidence collection and centralized vendor audits.

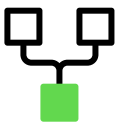
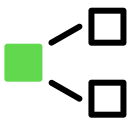
Related applications



Centralize all IT assets in a single, unified repository and synchronize asset records with the CMDB.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

A highlight of IT Asset Management features

	**Normalize software assets** Automatically normalize your software assets with updates from the Software Asset Management content service.
	**Manage software rights** Track and manage rights for your software products by creating or importing software entitlements.
	**Leverage publisher packs** Use license metric data for specific software publishers to accurately track your software usage.
	**Track SaaS subscription usage** Integrate with SaaS applications and SSO providers to track your SaaS subscription usage. Use this data to manage compliance and optimize licensing for your subscriptions.
	**View and take action on your license position** Use the License usage view (Software Asset Workspace) or License Workbench (Software Asset Management Core UI) to view your license compliance position and remediate any license compliance issues.
	**Track software spend** Track and manage financial transaction data for your software products to optimize your software spend.
	**Normalize hardware assets** Use the extensive hardware Content Library to normalize manufacturer and model data for your assets and to populate important life cycle dates for improved visibility into your asset estate.
	**Asset life-cycle automation** Reduce manual effort and improve service delivery using low-code prescriptive workflows based on the industry best practices that are available at each stage of the asset life cycle. Use asset tasks to automate workflows for bulk stock orders; disposal orders; and the deployment, swapping, and retirement of assets.
	**Refresh aging hardware assets** Proactively track and plan for aging assets that are nearing the end of their life cycles so that you can reduce replacement costs and the risk of hardware vulnerabilities.
	**Audit your asset inventory** Conduct scheduled or ad-hoc audits of your asset stockrooms and other asset locations, such as offices and data centers.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

A highlight of IT Asset Management features (continued)

	Manage expiring maintenance and lease contracts Take action on your expiring maintenance and lease contracts using task-based workflows within the simplified contract renewal process.
	Accelerate your cloud strategy and reduce costs Accelerate cloud implementation with a streamlined, responsive, and intuitive self-service cloud resource portal and non-intrusive policy guardrails. Reduce costs by rightsizing your cloud resources to match your organization's usage and by automatically turning off cloud resources during non-working hours.
	Manage financial regulatory audits Manage vendor audits from a centralized audit workspace with built-in regulatory content and prescriptive response workflows.
	Manage expiring maintenance and lease contracts Take action on expiring maintenance and lease contracts using task-based workflows within the simplified contract renewal process.
	Automate purchase orders and approvals Automate purchase orders, approvals, and receiving workflows to create asset records on delivery and reduce procurement cycle times.
	Standardize hardware, software, and cloud resources Maintain a single source of truth for all IT products and services used across ITAM with an employee-facing request portal.

Troubleshoot and get help

- Ask questions and explore other resources for IT Asset Management in the ServiceNow community
- Contact Customer Service and Support

Applications and features

- Asset Audit Response
- Base Asset Management
- Cloud Cost Management
- Software Asset Management
- Hardware Asset Management
- Contract Management
- Procurement
- Product Catalog
- IT Asset Management content request

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Learn

What is IT asset management (ITAM)?

Software Asset Management

The ServiceNow® Software Asset Management (SAM) application systematically tracks, evaluates, and manages software licenses, compliance, and optimization. You can reclaim unused software rights, purchase new software rights, and manage allocations for entitlements.

Watch this short video for an introduction to the Software Asset Management application.

https://player.vimeo.com/video/995307472?badge=0&autopause=0&player_id=0&app_id=58479

Note: Beginning with the ServiceNow AI Platform Brazil release, limited support is provided for the Software Asset Management classic user interface. While it remains active in your instance, including when you upgrade to a new ServiceNow AI Platform release, you're encouraged to move to the new workspace experience.

For the ITSM Software Asset Management feature of Asset Management, see ITSM Software Asset Management.

Explore  Learn the key features and business value that the Software Asset Management application offers.	Configure  Configure the features and components.	Use  Use the intuitive and new user interface to manage software licenses, compliance, and optimization.
Integrate  Extend the Software Asset Management capabilities by integrating with SaaS applications.	Supported software publisher licenses  Get details about publisher packs that can be used to extend functionality between the ServiceNow AI Platform and your third-party software applications.	Reference  Get details about components such as fields, roles, and license agreement types.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Learn

What is software asset management (SAM)?

Exploring Software Asset Management

The Software Asset Management application's user interface is enhanced to make it more user friendly and intuitive, allowing you to better manage your software installations.

Beginning with the ServiceNow AI Platform Brazil release, we will provide limited support for the Software Asset Management classic user interface. While it will remain active in your instance, including when you upgrade to a new ServiceNow AI Platform release, we encourage you to move to the new workspace experience.

The Software Asset Management application's core functionality remains the same in both the user interfaces.

Using the Software Asset Workspace

The Software Asset Management application is available with activation of the new Activate all Software Asset Management Professional plugins including Software Asset Workspace (com.sn_samp_master_ws). Activating this plugin automatically activates the Activate all Software Asset Management Professional plugin (com.sn_samp_master) and the Software Asset Workspace (sn_sam_workspace) store application . After the new plugin is activated, you can't access the classic user interface.

For releases prior to Brazil, if you activated the older Software Asset Management Professional plugin (com.sn_samp_master), the Software Asset Workspace is available with activation of the Software Asset Workspace plugin (com.sn_sam_workspace). After the Software Asset Workspace Workspace plugin is activated, you can't revert to the classic Software Asset Management application.

Note: After the Software Asset Workspace is activated, the menus in the classic Software Asset Management application are hidden for the features that have been moved to the Software Asset Workspace.

For detailed information on configuring and using the Software Asset workspace, refer to Configuring Software Asset Management and Software Asset Workspace.

Using the classic Software Asset Management application

To continue using the classic Software Asset Management application, you need to activate the Software Asset Management Professional (com.sn_samp_master) plugin.

If you later decide to use the Software Asset Workspace, you need to activate theSoftware Asset Workspace (sn_sam_workspace) store application.

For detailed information on configuring and using the classic Software Asset Management application, refer to Configuring Software Asset Management and Using Software Asset Management classic.

Menus that continue to reside in Software Asset Management classic

Even after you activate the Software Asset Workspace (sn_sam_workspace) store application, the following menus continue to remain in the classic framework:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software asset		
Software Asset Demand • Create New • Demands • Demand Requirement Administration • Custom Products • Custom part Numbers • Custom License Metrics • Software Asset Demand Actions • Pattern Normalization Rules • Reclamation Rules • Job Results • Content Service Setup • Refresh Processor Definitions • Migrate Software Results • Properties • Revert Customizations • Software Model with De-activated Discovery Maps SaaS License • Unrecognized Subscription Identifier • SSO Integration Profiles • Direct Integration Profiles SAP Compliance and Optimization • SAP Connections • Connection Setup • Scheduled Import • Transform History		

Software Asset Management overview

An overview of the functionality of the Software Asset Management application.

Software Asset Management functionality consists of these main features.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Feature area	Description
Dashboards	These dashboards show software installation results for your environment in the form of statistics and charts. • Software Asset Analytics: Overview, License Summary, Compliance Summary, and Removal Summary • Normalization and Content Service: Normalization trend charts • Software Publisher Analytics: Citrix, IBM, Microsoft, Oracle, SAP, and VMware. **Note:** The publisher pack add-on must be activated to see the Software Publisher Analytics dashboard. • Office 365 and Adobe Cloud **Note:** The publisher pack add-on must be activated to see the Office 365 and Adobe Cloud dashboard. • Software Asset Management: Overview, Optimization, Compliance Analysis
Licensing	Software models created for all installed software products are used to tie software installations (software being used) with entitlements (software owned). Entitlements define license details and are assigned to software models. Features include publisher part number lookup, common per core and per processor license metrics, entitlement discovery maps, exclusion listing, client access, license change projection, entitlement import, and entitlement import error results list.
Discovery and normalization	A discovery process, such as ServiceNow Discovery or Microsoft SCCM (2012 v2 or 2016), can be used to discover the software installed in your environment. The normalization process compares the discovered publisher, discovered product, and discovered version values against the ServiceNow repository of normalized equivalents An OOB Normalization library contains all content except publisher and product. Custom products can be created if a software product does not exist in the Software Library. Discovered software can also be manually normalized for reconciliation. A software discovery model is then matched to discovered software installations. Features include partial, full, and publisher normalization, License Workbench, License Position report, custom pattern normalization rules, normalization suggestions, on-premise customer support, and an optional Software Asset Management content service to update the Normalization Library with pattern normalization rules.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Feature area	Description
	The Integration — Microsoft SCCM 2016 plugin is compatible with SCCM version 1606, 1906, 1910, and 2002. **Note:** Legacy SCCM plugins, SCCM 2012 and SCCM 2016, will be deprecated in the upcoming releases.If you are creating the integration for the very first time, then begin with Microsoft SCCM Service Graph Connector SG Connector. If you are already using one of these plugins then use the application titled Migration Readiness Tool for Service Graph Connector for SCCM in the ServiceNow Store to prepare for migration to the Service Graph Connector.
Reconciliation	The reconciliation process calculates the compliance status of software products regarding discovery and entitlements. Removal candidates are generated for unused software that can be used to reclaim software rights. Features include reconciliation grouping, and remediation actions for resolving compliance issues.
Optimization	The reclamation process remediates non-compliance by uninstalling software from devices and reclaiming those software rights. The reclamation process can be automated using Client Software Distribution (CSD). Features include removal candidate and workflows, reclamation rule creation, software usage listing, and support for creating a purchase order directly using Procurement integration. For more information, see the Procurement overview.
Downgrade Rights	The concept of downgrading licenses is built into the Software Asset Management plugin feature. Downgrade rights is the process of having acquired the rights to the latest version of software but using the rights to license earlier versions of the same software. For more information, see Downgrade Rights.

AI in Software Asset Management

ServiceNow Otto for Software Asset Management (SAM) uses AI to automate software asset management operations, improve compliance, and optimize license management.

The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

For more information, see ServiceNow product tiers.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AI capabilities in ServiceNow Otto for Software Asset Management (SAM)

ServiceNow Otto for Software Asset Management (SAM) enhances the capabilities of the Software Asset Management application. It automates complex tasks, provides intelligent insights, and enables organizations to manage software assets, maintain compliance, and reduce costs.

With ServiceNow Otto for Software Asset Management (SAM) AI agent collection, organizations gain the following benefits:

- Reduce software request processing time by automating software request fulfillment.
- Identify and create reclamation rules for software products that lack reclamation rules but are viable candidates.
- Identify and reclaim unused licenses to reduce waste and accelerate license reclamation.

With ServiceNow Otto for Software Asset Management (SAM) generative AI skills, organizations gain the following benefits:

- Generate detailed publisher and product summaries to enhance software estate visibility and streamline compliance evaluation.
- Generate recommended actions to manage software license compliance and optimize licensing spend.
- Generate user resolution rules to support accurate mapping of incoming subscription data to SAM users.
- Create entitlements by extracting information from software contracts, reducing manual effort.
- Resolve entitlement import errors by normalizing the unresolved Publisher and Product field value.
- Identify software purchases in imported spend transactions, extract raw publisher and raw product values, and match them to existing publisher and product records in Software Asset Management Content Library for accurate spend reporting.

For more information about AI capabilities in ServiceNow Otto for Software Asset Management (SAM), see the following:

- Agentic workflows in ServiceNow Otto for Software Asset Management (SAM)
- Generative AI skills in ServiceNow Otto for Software Asset Management (SAM)

For information about AI assets that are available on the ServiceNow AI Platform, see the following topics:

- Generative AI skills
- Agentic workflows

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Domain separation is supported in ServiceNow Otto for Software Asset Management (SAM). For details, see Domain separation in the AI Admin Hub console.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Supporting information for ServiceNow Otto for Software Asset Management (SAM)

Get a quick overview of the important information that is related to the ServiceNow Otto for Software Asset Management (SAM) application.

Supported versions

Now Assist for SAM is supported starting with the Yokohama release.

Languages supported

The Now Assist for SAM application supports the following languages:

- Arabic
- Czech
- German
- Spanish
- Finnish
- French Canadian
- French
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Dutch
- Brazilian Portuguese
- Polish
- Portuguese
- Russian
- Swedish
- Thai
- Turkish
- Chinese (Simplified)
- Chinese (Traditional)

Application information

Activate the ServiceNow Otto for Software Asset Management (SAM) store app (sn_now_assist_sam) to use the publisher compliance summarization skill.

This store app has the following dependencies:

- Software Asset Management Professional (com.snc.samp)
- Software Asset Workspace (sn_sam_workspace)
- Now Assist for Platform (sn_genai_platform)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Now Assist AI Agents (sn_aia)
- AI Agents for ITAM (sn_itam_aia)

Activate the applications in the following order:

- Software Asset Management Professional
- Software Asset Workspace
- Now Assist for Platform
- ServiceNow Otto for Software Asset Management (SAM)

Agentic workflows in ServiceNow Otto for Software Asset Management (SAM)

Agentic workflows in ServiceNow Otto for Software Asset Management (SAM) enable ServiceNow Otto for SAM managers to manage software requests, create reclamation rules, and evaluate software removal candidates reducing manual effort and improving operational efficiency.

Available agentic workflows for ServiceNow Otto for SAM AI agent collection

Agentic workflow name	Description	Available AI agents
Help manage software request	Fulfill a software asset request by either allocating the available entitlements, if sufficient rights exist, or generating a purchase order with the necessary line items for the requested software model.	• Software entitlement allocation AI agent • Purchase order creation AI agent • Microsoft license assignment AI agent
Create software reclamation rule	Analyze the license usage of a product and if no reclamation rule exists, prompt the user to create one.	Software reclamation rule creation AI agent
Evaluate software removal candidate	Examine installed or subscription-based removal candidates for a software product by evaluating its software product usage within a specified period and the eligible total number of reclaimable candidates	Software removal candidate evaluation AI agent

Important: By default, all agentic workflows and AI agent records are read only.

You can run the agentic workflow as is by activating the workflow. Additionally, you can duplicate the workflow if you want to customize the workflow. If you duplicate the agentic workflow, adjust the settings according to your requirements and then activate the duplicated agentic workflow. You can also test the duplicated agentic workflow to analyze its performance in the AI Agent Studio, while it executes the instructions that you defined.

When you activate the agentic workflow, activate all agents within the agentic workflow.

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

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Generative AI skills in ServiceNow Otto for Software Asset Management (SAM)

ServiceNow Otto for Software Asset Management (SAM) includes generative AI capabilities that help ServiceNow Otto for SAM managers streamline daily workflows, gain real-time insights, and automate repetitive tasks throughout the software asset lifecycle.

ServiceNow Otto for Software Asset Management (SAM) generative AI skills help ServiceNow Otto for SAM managers to achieve the following:

- Generate actionable recommendations to improve software license compliance and reduce licensing spend.
- Automate insights and summaries to eliminate manual analysis, and extract meta data from a uploaded document.
- Cut time spent on routine administrative and error-resolution tasks, resulting in faster decision-making without manual work on repetitive activities.
- Classify imported spend transactions to identify software purchases and match them to existing publisher and product records in Software Asset Management Content Library for accurate spend reporting.

The following table describes the key generative AI skills available in ServiceNow Otto for SAM:

ServiceNow Otto for Software Asset Management (SAM) generative AI skills

Generative AI skill name	Description
Publisher compliance summarization	Generates a comprehensive summary for a publisher that covers software deployment, license compliance, configuration health, and optimization.
Product compliance summarization	Generates a comprehensive summary for a product that covers software deployment, license compliance, optimization, and issues.
Recommended actions	Generates recommended actions to manage software license compliance and optimize licensing spend.
Error log summarization	Generates error messages and detailed guidance to troubleshoot runtime job failures for SaaS integrations.
Error resolution recommendation	
SaaS user resolution	Generates user resolution rules for accurate mapping of incoming SaaS subscription data to SAM users.
Contract entitlement data extraction	Creates entitlements by extracting information from software contracts where the contract model is a software license.
Resolve entitlement import errors by using ServiceNow Otto for Software Asset Management (SAM)	Streamline the entitlement import process by resolving import errors, for a faster import process and improved data accuracy.
Spend transaction software classification	Classifies imported spend transactions to identify software purchases, and derives the raw publisher and raw product from fields

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ServiceNow Otto for Software Asset Management (SAM) generative AI skills (continued)

Generative AI skill name	Description
	such as description, vendor name, and GL account.
Spend transaction software normalization	Normalizes the raw publisher and raw product from software transactions by matching them to existing publisher and product records in Software Asset Management Content Library.

The generative AI skills are available to the sam_user and the sam_admin roles.

Custom role configurations for accessing generative AI skills are preserved. For example, if you added an alternative role such as the sam_admin role instead of the default sam_user role, the sam_admin role retains access, while the sam_user role loses access, based on the custom configuration.

The sam_user role includes the Otto Admin User (sn_nowassist_admin.user) role. The sam_user role has read-only access to the Otto Admin to view the generative AI skills.

Software Asset Workspace

Use the Software Asset Workspace, the intuitive and streamlined user interface of the Software Asset Management application, to manage software licenses, compliance, and optimization.

Software Asset Workspace landscape

The Software Asset Workspace is a unified medium with multiple views. The views let you create entitlements, software models, run and review reconciliation results, remediate non compliance, give visibility into your software assets, and provides access to analytics via dashboards. Additionally, you can export asset information from the Software Asset Workspace using the **Export** button on all the related lists. To use the export functionality for versions earlier than Xanadu, see knowledge base article KB1709844.

The Software Asset Workspace contains the following views:

- Software asset overview: The landing page of the Software Asset Workspace. You can create entitlements, run reconciliation, view key metrics and get time sensitive alerts and notifications regarding your software assets.
- License usage: You can view the compliance status of all your publishers, review reconciliation results, reclaim unused software, and view and run reports.
- License operations: Lists all the entitlements, software models, import entitlement errors, discovery models, user subscriptions, engineering applications data, contract, and IBM ASP and ILMT integrations.
- Software asset analytics: View consolidated dashboards for SaaS, discovered inventory, optimization, lifecycle management, cloud cost simulator, Engineering License, and normalization and content.
- Success portal view in Software Asset Workspace: Assess the performance of the Software Asset Management application in your environment.
- Renewals calendar: View the entitlements nearing their expiry date and contracts nearing their expiry date or are already expired.
- Overlapping usage: View the feature level usage of your SaaS and SSO applications.
- Content lookup portal for Software Asset Management: View the data stored in the Software Asset Management Content Service.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software asset overview

Enhance your software asset management experience by using the modernized and user-friendly software asset overview view. The software asset overview is a simplified and intuitive environment that helps you use the application more effectively by reducing complexity.

Use the software asset overview view to:

- Gain insights into key metrics such as compliance trends, true-up costs, potential savings, normalization rates.
- Execute routine tasks such as running reconciliation or creating entitlements.
- Get actionable insights into your software assets via alerts and notifications.
- Sort by product or publisher to narrow down your results.
- Filter by Published status to view reports and dashboards only related to the software products that you manage in a phase-wise implementation of Software Asset Management.

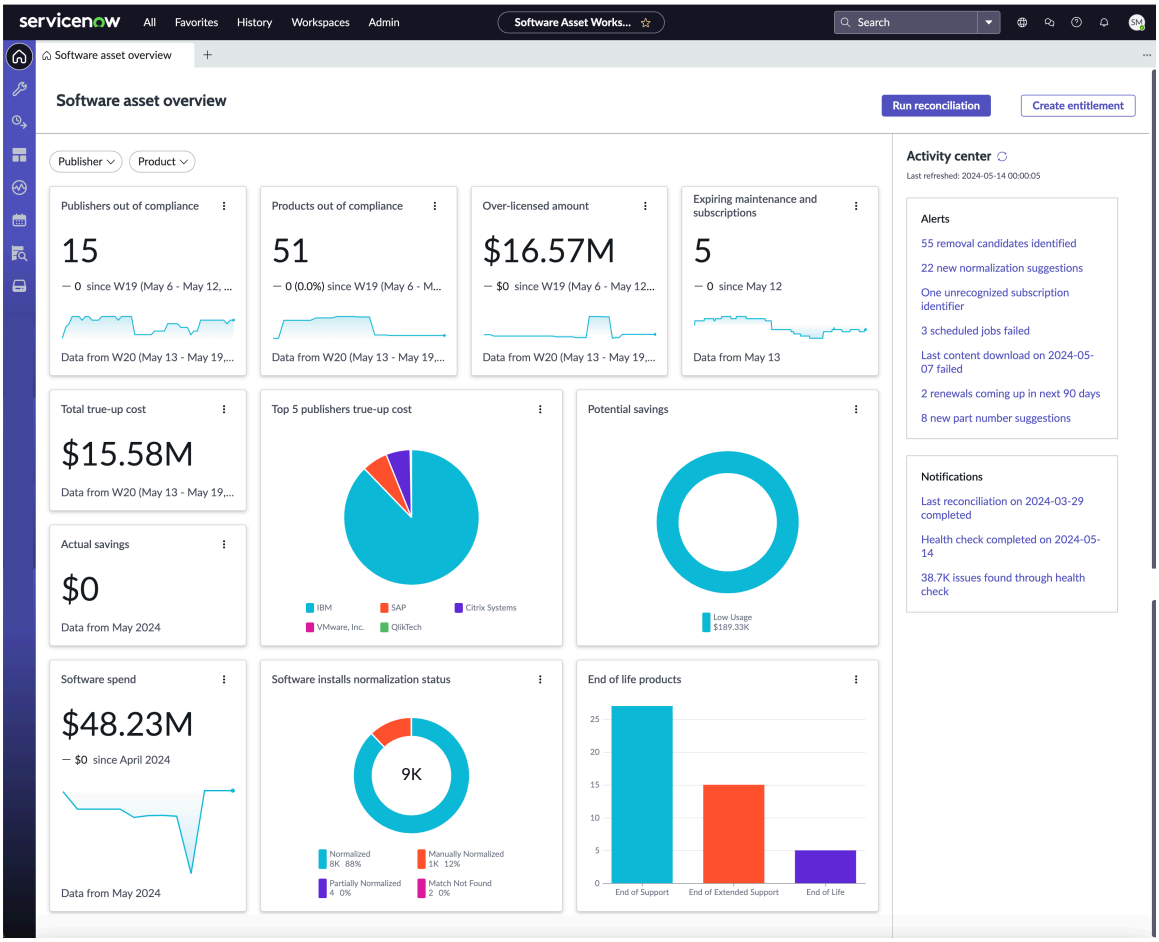
  Note: The Published status filter is shown only when the system property com.snc.samp.manage.published.products is enabled on your ServiceNow instance. By default, this filter is set to **Published** and the following reports show details of published products:

  - Publishers out of compliance
  - Products out of compliance
  - Over-licensed amount
  - Total true-up cost
  - Top 5 publishers true-up cost
  - Software spend

  However, you can also view reports related to the products that aren't published by setting this filter to **Unpublished**. To view reports related to all the products, clear the Published status filter.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software asset overview view



Select any widget to view detailed information. All the widgets are updated whenever a new reconciliation result is available.

To narrow down your results, you can filter the workspace by publisher or product.

Note: If you select more than one publisher in the filter and then select the **Publishers out of compliance** widget, all non-compliant publishers are listed. The same is true for products.

Software asset overview dashboard

Report	Source	Description
Publishers out of compliance	Product Results [samp_product_result]	The number of publishers that have at least one software model out of compliance. Select the report to view the results in the License usage view.
Products out of compliance	Product Results [samp_product_result]	The number of products that have at least one software model out of compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software asset overview dashboard (continued)

Report	Source	Description
		Select the report to view the results in the License usage view.
Over-licensed amount	Product Results [samp_product_result]	Cost of licenses owned but not being used.
Expiring maintenance and subscription	Software Entitlement [alm_license]	End date of the total sum of all entitlements that are going to expire within 6 months. The total sum of entitlements includes: • Perpetual • Maintenance • Perpetual + Maintenance • Upgrade • SA • Perpetual +SA • Step-up Select the report to view details about the specific entitlements that are going to expire. **Note:** Maintenance and SA entitlements aren't displayed as the Perpetual entitlements associated with them are displayed.
Total true-up Cost	Product Results [samp_product_result]	Cost to be compliant based on the average prices in entitlements for the rights by publisher.
Top 5 publishers true-up cost	Product Results [samp_product_result]	The top 5 publishers illustrated in a pie chart in order of true-up cost.
Potential Savings	Product Results [samp_product_result]	Cost saved if removal candidates are reclaimed. Hover on the donut chart to view the number of removal candidates for a specific justification along with the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software asset overview dashboard (continued)

Report	Source	Description
		cost. Removal candidates are grouped by justification. Select on a justification on the donut chart to take you to the list of removal candidates with that specific justification.
Actual savings	Reclamation Candidate [samp_sw_reclamation_candidate]	Sum of potential savings in a given month of closed complete removal candidates.
Software Spend	License Metric Results [samp_license_metric_result]	Total software cost of all entitlements that aren't retired.
Software installs normalization status	Software Discovery Models [cmdb_sam_sw_discovery_model]	Count of software installs based on the normalization status. Select a normalization status on the donut chart to view the list of discovery models along with the installation count for each discovery model. You can further select a discovery model to view the list of software installations. The report for this widget is populated only once the following daily scheduled jobs have run: • SAM - Normalize discovery models using content library rules • SAM - Daily Job **Note:** Only the Product filter can be applied to this widget.
End of life products	Product Lifecycle [sam_sw_product_lifecycle]	Graph of software product lifecycles that are reaching their end of life cycle. Select to drill down to the software installations.

Activity center

Get alerts and notifications regarding your software assets. These alerts and notifications are asynchronous in nature. The Activity center displays a pre-defined set of alerts to notify you of

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

actions that require your immediate attention. Notifications about events or activities that you should be aware of also appear in the Activity center. Select an alert or notification for more information.

Any user with the role of sam_user can access all alerts and notifications except for the following alerts that require the sam_admin role.

- Scheduled jobs failed.
- Last content download failed.

Alerts in the Activity center

Alerts	Source	Description
Removal candidates identified	Removal Candidate [samp_sw_reclamation_candidate]	New removal candidates whose active status is true and the state is ready. Select to view the entire list of removal candidates in the License usage view.
New normalization suggestions	Normalization Suggestions [samp_normalization_suggestions]	Normalization suggestion records created where the state is new. Select to view the new normalization suggestion records in detail.
Unrecognized subscription identifiers	Unrecognized Subscription Identifier [samp_sw_unrecognized_subscription_identifier]	The number of unrecognized subscriptions are identified in the software model column is empty.
New software request	Request [sc_request]	Software requests where the request state is pending approval. Select to view the software request list in the classic Software Asset Management interface.
Last reconciliation failure	Reconciliation Result [samp_reconciliation_result]	The latest scheduled job for the reconciliation process failed. Select to view the results in the License usage view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Alerts in the Activity center (continued)

Alerts	Source	Description
		Note: Last reconciliation failed (an alert) or Last reconciliation completed (a notification) is shown depending on the status of the reconciliation process. If the reconciliation process failed, an alert is shown. If the reconciliation process was successful, a notification is shown.
Scheduled jobs failed	Software Asset Job Result [samp_job_log]	Scheduled jobs that failed in their latest run within the last one week. Select to open the Software Asset job Logs in a new tab. **Note:** Only a user with the sam_admin role can access the Software Asset Job result table.
Entitlement import errors	Entitlement Import Error [samp_entitlement_import]	Entitlement import errors where the error status column has the value open.
New entitlement import error created via purchase receipts	Entitlement Import Errors [samp_entitlement_import]	The number of entitlement import errors where the purchase orders have an associated procurement integration profile. **Note:** This alert appears only when the Asset Management - Procurement Integration (app-itam-procurement-integration) store application is installed. For more information, see Install Asset Management - Procurement Integration.
Last content download failed	Asset Job Log [asset_job_log]	The latest scheduled job for content download failed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Alerts in the Activity center (continued)

Alerts	Source	Description
		Note: Only a user with the sam_admin role can access the Asset Job Log table.
Failed - entitlement import of <<.xlsx>>	Entitlement Import [samp_bulk_import]	Entitlement import status based on its success or failure. The failed status is displayed as an alert or one of the completed statuses is displayed as a notification: • Completed - entitlement import • Completed with errors - entitlement import
New CPE normalization suggestion	CPE Normalization Suggestions [sn_samp_vr_cpe_mapping_suggestion]	CPE normalization suggestion records created where the state is new. Select to view the new CPE normalization suggestion records in detail.
Number of renewals coming up in 90 days	• Contract [ast_contract] • Software License [alm_license]	The number of software contract and entitlement renewals coming up in 90 days. Select the alert to view the upcoming renewals within 90 days from the current date.

Notifications in the Activity center

Notifications	Source	Description
New SSO applications identified last week	SSO Application [samp_sso_application]	New single sign-on (SSO) applications that have the SSO status as disconnected and were created within the last one week from the current date.
Last reconciliation completed	Reconciliation Result [samp_reconciliation_result]	The latest scheduled job for the reconciliation process was successfully completed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Notifications in the Activity center (continued)

Notifications	Source	Description
		Select to view the results in the License usage view.
Products nearing end of life	Software Lifecycle Report [sam_sw_product_lifecycle_report]	Products that are nearing the end of their lifecycle and the install count is greater than 0.
New PPNs added to the library	Software Product Definition [samp_sw_product_definition]	New PPNs added to the Content Service library with the latest content version as compared to the present date.
Software asset demands approved	Software Asset Demand [samp_demand]	Software Asset Demand list view filtered by those that are approved.
Completed - entitlement import or Completed with errors - entitlement import	Entitlement Import [samp_bulk_import]	Entitlement import is successfully completed or completed with some errors. **Note:** If the entitlement import fails, it's shown as an alert.
New entitlement created via purchase receipts	Software Entitlements [alm_license]	Number of entitlements created from purchase orders that have an associated procurement integration profile. **Note:** This notification appears only when the Asset Management - Procurement Integration (app-itam-procurement-integration) store application is installed. For more information, see Install Asset Management - Procurement Integration.
Review CMDB data quality	SAM Workspace Activity Center Items [samp_ws_activity_center_items]	Opens the CMDB success advisor for SAM dashboard to review software install data quality metrics and remediation actions. If the scope isn't configured yet, opens the **Edit dashboard scope** dialog box instead. For more information, see Using

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Notifications in the Activity center (continued)

Notifications	Source	Description
		CMDB success advisor for SAM.

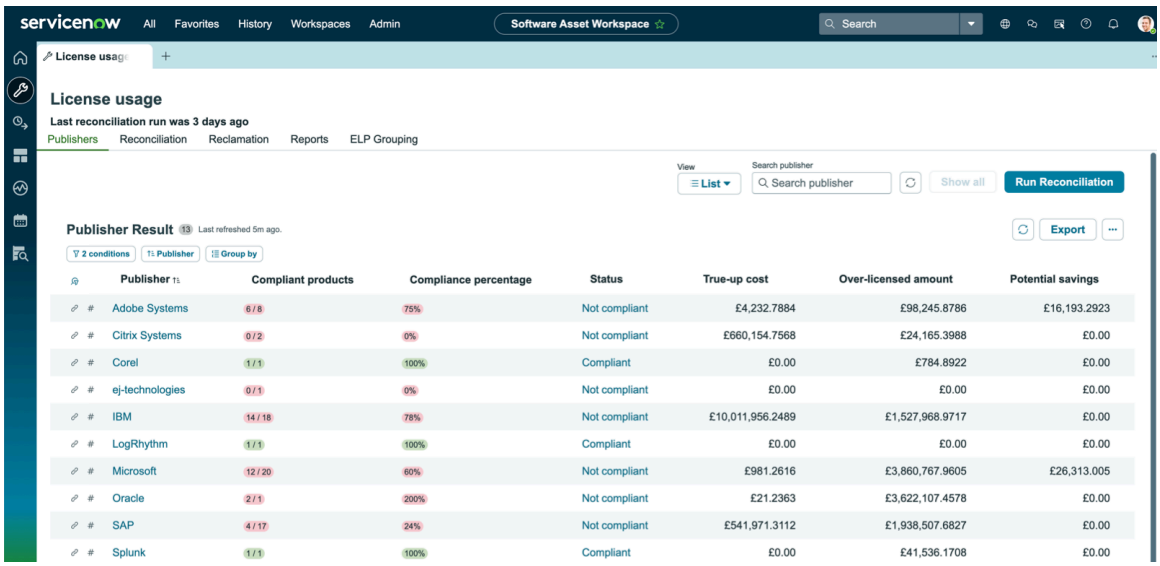
License usage view

Use the license usage view as a single plane to understand the license position of all software products, remediate non-compliance, view reconciliation results, view, or add removal candidates, and view Software Asset Management related reports.

Overview of the License usage view

The License usage view enables you to view the license usage trends for your organization. This view helps forecast the needs of your organization by trending the number of licenses required against the number of licenses purchased. Manage your license positions by purchasing additional rights before software consumption surpasses the number of rights owned.

Access the License usage view by navigating to **Software Asset Workspace** > **License usage**.



Use the License usage view to:

- pin publishers in the card view (user specific, saved).
- view key metrics for the publishers, such as over-licensed amount and true-up cost.
- filter by domain and compliance status.
- sort by true-up cost, over-licensed amount, and potential savings.
- run a reconciliation and view its results.
- be informed about the last reconciliation run.
- view reclamation summary.
- view and export reports.
- generate a report on your ELP data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- view publisher cards specific to the software products that you published as part of the phase-wise implementation of Software Asset Management. For more information, see Publish a specific set of your software products.

Note: The filter for published status is automatically applied.

Publishers tab

View the compliance status of all your publishers. Each publisher card displays its color-coded compliance status along with the percentage of compliance. As the products get compliant, the color changes to green.

- compliant: Indicated by the color green. All products under the publisher are compliant.
- non-compliant: Indicated by the color red. All products under the publisher aren't compliant.

A red icon  on a publisher card indicates that reconciliation failed for that publisher. Open the card to read the details. For details on which specific products failed, refer to the navigation tree on the Publisher details page.

Note: Even though a publisher card may display a red icon, you may not notice any failed products on the navigation tree because the failure may have occurred before the product results were generated.

You can view publishers by toggling between a card view and a list view. The list view lets you further analyze publisher compliance details such as the publisher with highest true up or the highest potential savings or filter on publishers. By default, the card view appears. If the *com.snc.samp.manage.published.products* property is enabled on your instance, the list view displays published publishers along with the Status column. If domain separation is supported on your instance, the list view displays the Domain column too.

The pinned publishers are displayed followed by unpinned publishers. To view the compliance of selected publishers, you can pin publishers for easy access. Select the bookmark icon on a card to pin it. As soon as you pin a publisher card, it moves from the Unpinned publishers section to the Pinned publishers section.

Note: The list of pinned publishers is saved on a per-user basis. The pinned publishers are stored in the Pinned User Publisher [samp_pinned_user_publisher] table.

View publisher cards related to the software products that you manage in a phase-wise implementation of Software Asset Management using the Published status filter. Filtering by Published status enables you to reduce clutter on the License usage view.

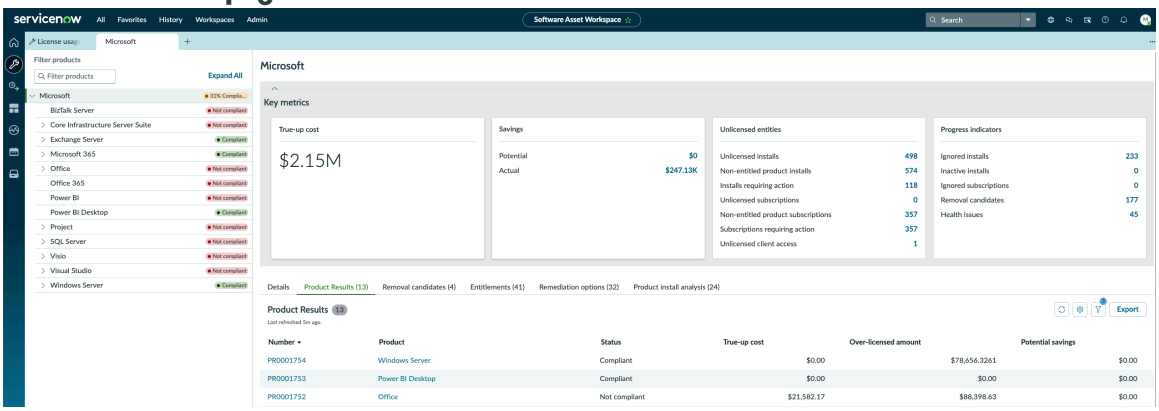
Note: The Published status filter is shown when the system property *com.snc.samp.manage.published.products* is enabled on your ServiceNow instance. By default, this filter is set to **Published** and all the publisher cards show details of published products. However, you can also view license compliance reports related to the products that aren't published by setting this filter to **Unpublished**. To view reports related to all the products, clear the Published status filter.

Publisher details

To view compliance details about a publisher, select a publisher card. A summary of that publisher's compliance appears in the Publisher details page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Publisher details page



View the following related lists for a publisher and its products.

- Product Results: A product result record for a licensable product is generated after reconciliation even if there are no software models defined for the product.
- Software Model Results: A software model result record is generated for each individual software model related to a product and is only created when a software model or entitlement exists for the product.

  Note: To generate software models results for all software models, with or without entitlements, you can set the property *com.snc.samp.unlicensed_smr_creation* to true. By default this property is set to false.

- License Metric Results: A license metric result record is generated for each license metric associated with a software model.
- Removal candidates: list of removal candidates.
- Entitlements: entitlements associated to the publisher.
- Product install analysis: the license consumption analysis for products of a publisher. Open a record to view a hierarchical node map that illustrates how the installations of a specific product are being licensed. Product install analysis is available at the publisher level and not at the individual product level. For more details, see View license usage for your installations.

To prevent clutter in the Publisher details page, software models results are shown only for software models that have entitlements. Software models without any entitlements are shown at the product level in the product results. To view software model results for all software models with or without entitlements, you can set the property, *com.snc.samp.unlicensed_smr_creation*, to true. By default, this property is set to false.

The navigation tree for the publisher appears on the Publisher details page with one of the following compliant statuses:

- Compliant: Reconciliation completed successfully and it was determined that installations and subscriptions are in compliance.
- Not compliant: Reconciliation completed successfully and it was determined that the installations and subscriptions aren’t in compliance with purchased licenses.
- Failed: Reconciliation failure occurred and so can't correctly determine compliance. If a product fails, then everything underneath that product, such as software model results, also fails.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The navigation view shows license compliance details of products that were published. Scroll down to the reports mentioned in the Publisher metrics table to view details of published products. If you want to view details and compliance results of other unpublished products, you must set the Published status filter to **Unpublished**.

In the navigation view, a non-consumption icon is displayed next to a software model that has not utilized any licenses. Such software models are always positioned at the bottom of the tree and no software model results are shown for that software model.

A brief summary of metrics appears along with related lists pertaining to that publisher. For details on the metrics, refer to the Publisher metrics table. For details on the related lists, refer to License usage publisher fields in workspace.

The navigation tree enables you to perform the following actions:

- drill down to a product, software model, or license metric to view the calculation and compliance information from the latest reconciliation results.
- filter products (active filtering, including collapsed items).
- expand and collapse tree links.

By default, the navigation tree is collapsed.

Publisher metrics

The table explains the report, the source, and the description of each publisher metric.

Report	Source	Description
True-up cost	Product Result [samp_product_result]	Estimated cost of remediating unlicensed installations based on the lowest number of rights needed (rights needed multiplied by average price per right from entitlements). The lowest cost from Purchase Rights remediation options.
Potential savings	Removal Candidate [samp_sw_reclamation_candidate]	Estimated cost of savings if software installations are reclaimed. The sum of all potential savings from all removal candidates. Select the report to see the list of removal candidates.
Actual savings	Removal Candidate [samp_sw_reclamation_candidate]	The total savings achieved if removal candidates are reclaimed. Select the report to see the list of removal candidates.
Unlicensed entities	Software Installation [cmdb_sam_sw_install]	Indicates the unlicensed entities for this publisher, product, and software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
	Software Subscription [samp_sw_subscription] Oracle Options [samp_oracle_options]. SAP Users [samp_sap_system_user] SAP Engine Usage [samp_sap_sw_client_access] Entity unlicensed reason [samp_entity_unlicensed_reason] Unlicensed reason [samp_install_unlicensed_reason]	The following are some of the indicators: • Unlicensed installs: refers to installations for which you have purchased some entitlements, but the rights owned are not sufficient to cover all the entities that require rights. You can perform remediation actions such as removing unlicensed installations or you can purchase more rights. • Non-entitled product installs: indicates products with installations at ServiceNow that currently have no associated entitlements. You need to create entitlements for these products. • Installs requiring action: indicates an action that you need to perform to fix an issue for an installation, such as problems with CIs, entitlement, or software model setup. After you select Installs requiring action, a list appears showing installs that need action, organized by reason categorizes. Select **Show all** to expand and view the specific list of installs. You can further select a value in the Reason column for a more detailed explanation of the reason. For details on reconciliation results such as product results and software model results, see Software reconciliation results.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
		Note: An installation may have more than one issue. It is necessary to address each issue to fully resolve problems with an installation. Therefore, the number shown on the progress indicator and the details when you drill down may not align. Please ensure all issues are fixed for the installation. • Unlicensed subscriptions: indicates that there are insufficient entitlements to cover the purchased subscriptions on SaaS. Therefore, you need to create the necessary entitlements • Non-entitled product subscriptions: indicates subscriptions at ServiceNow that currently have no associated entitlements. You need to create entitlements for these subscriptions. • Subscriptions requiring action: Analyze subscription-related issues and perform necessary corrective measures. • Unlicensed client access: refers to unlicensed CAL records on account of not having enough rights on entitlements to cover the CAL records. You need to purchase more CAL licenses for the products. • Unlicensed options: refers to unlicensed Oracle Database options and management packs. Select the number adjacent to each category for a more

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
		detailed explanation of each installation, including the reason and causes of their unlicensed status.
Progress indicators	Software Installation [cmdb_sam_sw_install] Requested Item [sc_req_item] Removal Candidate [samp_sw_reclamation_candidate]	Indicates the compliance progress already made for this publisher, product, and software model. The progress indicators differ for each publisher. The following are some of the indicators: • Ignored installs: installations ignored from the reconciliation process. • Inactive installs: Indicates software installs that are marked as inactive by Software Asset Management Professional. These installs aren't included in license calculation and don't require any action. • Ignored subscriptions: Indicates subscriptions that are marked as inactive by Software Asset Management Professional. These subscriptions aren't included in license calculations and do not require any action. • Removal candidates: Details of all removal candidates created for reasons such as low usage and unlicensed install removal. • Health issues: Displays all health check issues for your Software Asset Management configurations. Select a health check issue to address and fix the error. If there are no health issues, the Health issue indicator isn't shown. Select the number adjacent to each category for a more

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
		detailed explanation of each installation.

Reconciliation tab

View all the historical reconciliation results in this tab along with the following status:

- **Completed**: If all the products and publishers completed reconciliation successfully.
- **Failed**: If all the products and publishers failed reconciliation.
- **Partially Completed**: If only some products or publishers completed reconciliation successfully.

Results of the latest reconciliation run are shown in the License usage view. For more details, see Software reconciliation for compliance.

Reclamation tab

View consolidated reclamation summary across all publishers, SaaS integrations, installed software, and reconciliation flows. Access individual records for reviewing the reclamation details and act accordingly.

Reports tab

Create, view, and run reports from this tab. All the following base system reports are available in this tab:

- Software product lifecycle report
- Software license compliance position
- Azure BYOL realized savings report
- Software models with deactivated discovery maps
- Oracle Database Deployments per Agreement report
- Oracle Infrastructure report
- Microsoft Windows and SQL Server infrastructure details reports
- SaaS detection report
- Microsoft Server Infrastructure and License Consumption report

To create and manage reports, see Create and manage reports in workspace.

ELP Grouping tab

Generate a report that groups your effective license position (ELP) data on existing reconciliation groups without needing to re-run the reconciliation process. For details on generating a ELP report, see Generate an Effective License Position (ELP) report.

License usage publisher fields in workspace

Field descriptions for the related lists for publishers in the Publishers page in the License usage view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Product Results

Field	Description
Number	Unique product result number that is generated during the reconciliation process.
Publisher	Publisher of the software.
Product	Name of software product.
Group	Group to which the product result belongs.
Subgroup	Subgroup to which the product result belongs.
Latest	Indicates whether this product result is from the most recent reconciliation run.
Reconciliation result	Unique reconciliation result number that is generated during the reconciliation process.
Status	Status of the product. • Compliant • Not Compliant
True-up cost	Estimated cost of remediating non-compliance based on the lowest number of rights needed.
Over-licensed amount	Estimated cost of rights not being used. The sum of all Over Licensed amount values from every software model result.
Potential savings	Estimated cost of savings if software installations are reclaimed. The sum of all potential savings from all removal candidates.
Licensed installs	Total number of installations that are licensed for the product.
Unlicensed installs	Total number of installations that are unlicensed for the product.

Software Model Results

Field	Description
Software model result	Name of the software model.
Status	Status of the software model.
Unlicensed installs	Total number of installations that are unlicensed for the associated software product.
True-up cost	Estimated cost of remediating non-compliance based on the lowest number of rights needed.
Over-licensed amount	Estimated cost of rights not being used.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Potential savings	Estimated cost saved if reclamation candidates are reclaimed.

License metric Results

Field	Description
Software model	Name of the software model
License metric	Name of the license metric that the software license is counted against when reconciliation runs.
Licenses owned	Sum of all active rights from entitlements that share a license metric.
Licenses required	Sum of rights that are used during reconciliation (allocated plus not allocated and installed).
Licenses available	Sum of rights that are not used during reconciliation (rights owned minus rights used).
True-up cost	Estimated cost of remediating unlicensed installations that are based on the lowest number of rights needed.

Entitlements

Field	Description
Display name	Name of the publisher.
Metric group	The metric group specific to the publisher.
License metric	The license metric for the metric group that the software license is counted against when reconciliation is run.
License type	The type determines whether the rights grant full access to the software or if they are being upgraded from a previous version of the software.
Active rights	Number of rights to be granted for this entitlement. **Note:** If an enterprise contract is attached to the license, the **Active rights** field is not shown
Purchased rights	Number of rights you purchased.
Total cost	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Removal candidates

Field	Description
Number	Removal candidate number.
Name	Name of the removal candidate.
Publisher	Name of the publisher.
Product	Name of the product.
Potential savings	Savings to be gained from reclaiming unused software installations.
State	State of the removal candidate. • Attention Required • Ready • Awaiting User • Awaiting Approval • Approval • Awaiting Revocation • Closed Complete • Closed Skipped
Justification	Reason for becoming a removal candidate. • Low Usage (default) • Unallocated • Unlicensed • Restricted Software

Remediation options

Field	Description
Remediation action	Action to take for compliance. • Purchase Rights • Remove Allocations • Create Allocations • Remove Unallocated Installs (Not available for Oracle database options) • Remove Unlicensed Installs (Not available for Oracle database options) • Remove Unlicensed Installs - Cloud (available only if you have cloud installations)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Status	Status of the remediation option. • New (blue) • Complete (green) • Void (red) • In Progress (yellow) In Progress state indicates that removal candidates were created for the installs.
Affects compliance	Specifies whether the remediation options affect compliance.
Display Name	Specific license metric of the software model result.
Actionable rights	Total rights affected by the action.
True-up cost	Estimated cost of remediating unlicensed installations based on the lowest number of rights needed.

License operations view

Use the License operations view in Software Asset Workspace to manage software asset operations.

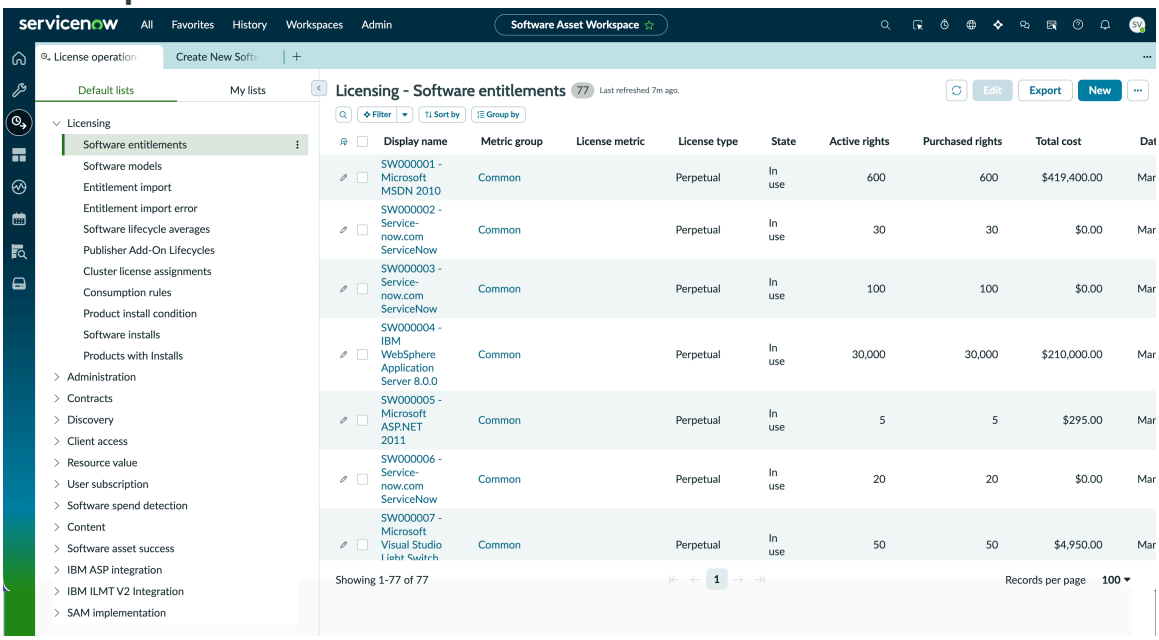
The operations on the License operation view include license management, administration,contracts, discovery, client access, resource value, user subscriptions, content suggestions, cloud cost simulation, and SAM implementation. The application specific operations include IBM ASP, IBM ILMT V2 integrations, and engineering apps integrations.

Access the License operations view by navigating to **Software Asset Workspace** > **License operations**.

The list view of the software assets shows the total number of records for your organization based on the value specified in the system property **SAM Workspace License operations list count limit** (*sn_sam_workspace.sam_license_operations_list_count*). The default value for the record count is set to **5000000**. However, the SAM administrator can set the value for the count in the system property as required. If there are less than five million records, then the exact count is shown. If there are more than five million records, then the count is shown as 5000000+.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License operations view



The License operations view includes the following categories:

- **Licensing**
  - **Software entitlements**

    View the details of the software entitlements that record the terms of your software licenses. You can also create entitlements to enter your license details and allocate purchased rights to users or devices. For more information, see Create entitlements in workspace.

  - **Software models**

    View the details of the software models created and also create a software model. For more information, see Create a software model in the Software Asset Workspace.

  - **Entitlement import**

    View the details of the imported entitlements and also import entitlements at one go. For more information, see Import bulk entitlements in workspace.

  - **Entitlement import error**

    View the details on entitlement import errors that are generated while importing software entitlements. For more information, see Entitlement import error fields.

  - **Software lifecycle averages**

    Create averages to calculate the End of Life (EOL) and End of Support (EOS) life cycles of your software. For more information, see Create averages for product life cycles in workspace.

  - **Consumption rules**

    Create consumption rules to restrict license consumption to certain entities within your organization. You must link this rule to one or many entitlements. For more information, see Create consumption rules and Link consumption rules to entitlements.

  - **Product install condition**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View the product install condition that accounts for all software model installations for a product during reconciliation. These installation conditions are applicable for the software product and all its components. For example, if you have purchased Microsoft Visual Studio, set#up product installation conditions for using Visual Studio only to consume licenses in your non-production#environment. These same conditions then apply across all software models under Visual Studio, including downgrades and#editions. For more information, see Create product install conditions.

- **Administration**
  - **Reclamation rules**

    View the details of reclamation rules that are configured to specify a period of time, amount of time, or the most recent date that a software unit must be used before the software is flagged for reclamation. For more information, see Software reclamation rules.

  - **Deduplication rules**

    View the details of software deduplication rules that are created to define how duplicate software installations are identified and matched within your organization. For more information, see Software install deduplication.

- **Reclamation**
  - **Removal candidates**

    View a list of all removal candidates. Removal candidates are used to reclaim software installations that aren't being used. You can also create removal candidates. For more details, see Create a software removal candidate in workspace.

  - **Reclamation summary**

    View reclamation candidates consolidated by software model, product, and justification across all reclamation sources. Select a record to view the individual removal candidates in that group.

- **Contract - Software contracts**

  Create a software contract to bind agreement between two parties. Create a contract.

- **Discovery**
  - **Discovery models**

    View and update software discovery models that are created when a version of software is discovered in a network environment. For more information, see Discovery models and software installations.

  - **Software installs**

    View the details of software installation such as discovery model, publisher, and reconciliation details. The list view also shows the total number of software installation records for your organization. For more information, see Software installation fields.

  - **Software usage**

    View software usage records to track the usage of software products for which you have created reclamation rules. You can also create software usage records manually from third-party integrations or Microsoft System Center Configuration Manager (SCCM) integrations. For more information, see View or create software usage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **SAP engines**

  View the monthly engine usage measurements for SAP clients based on the license metric for each engine.

- **SAP users**

  View all the discovered users pulled from the SAP systems and their details such as SAP user roles, SAP user active transactions, SAP user activities, and SAP web activities. For more information, see View SAP users in workspace.

- **SAP named user types**

  Create a custom-named user type that can be used with your SAP software entitlement. Creating a custom-named user type enables users to track licenses of their SAP systems. For more information, see Create a custom named user type in workspace.

- **SAP price lists**

  Create custom SAP price lists so that you can track and manage SAP licenses based on the contracts of your SAP system. For more information, see Create custom SAP price lists in workspace.

- **SAP USMM rules**

  View SAP User License Measurement (USMM) rules that map roles to the named user type for an SAP client. For more information, see SAP USMM-based optimization.

- **SSO applications**

  View details related to applications that you can connect through an SSO provider. For more information, see View SSO applications in workspace.

- **SSO groups**

  View details related to all SSO groups that have access to an SSO application. For more information, see View SSO groups in workspace.

- **SSO users**

  View details of all users that have direct access to an SSO application, but not through membership in a group. For more information, see View SSO users in workspace.

- **Client access**

  View the details of software client access records. You can also create a record to track and manage the users or devices that are accessing a version of your server software using a client access license (CAL). For more information, see Create a software client access record in workspace.

- **Resource value**

  View and create Resource value records for the software models. For more information, see Create a resource value record.

- **User subscription**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **User subscription**

  View the details of the software subscriptions for SaaS and SSO applications. You can also create a software subscription. For more information, see Create user subscriptions in the workspace.

- **Direct integration profiles**

  View the details of the already created SaaS integration profiles. You can also create an integration profile by selecting the integration type to view software usage and optimize stale licenses. For the supported SaaS applications and procedures, see Integrate with SaaS applications.

- **SSO integration profiles**

  View the details of the already created SSO integration profiles. You can also create an SSO integration profile by selecting the integration type to view software usage and track user login data for all connected SSO applications, and reclaim unused licenses. For the supported SSO applications and procedures, see Integrate with SSO providers.

- **Subscriptions without user**

  View the list of subscriptions where the User field is empty on the Software Subscription [samp_sw_subscription] table.

- **User resolution rules**

  Create a user resolution rule to map user subscriptions from SaaS applications to the User [sys_user] table in ServiceNow AI Platform. For more information, see Associate a user with subscription records.

- **SaaS feature usage**

  View the event details for each SaaS and SSO integration performed by the users, such as the event ID, event name, last activity, subscription, product, subscription profile, and publisher. For more information, see Overlapping usage view.

- **Software storage usage**

  View the usage information for various SaaS applications including details on the allocated storage and used storage in bytes that is stored in the Software storage usage [saas_sw_storage_usage] table. For more information, see Software storage usage fields.

- **CrowdStrike product usage**

  View the list of usages for various CrowdStrike software models and license metrics. Select a record in the list to view its details.

- **CrowdStrike product workload mappings**

  View the list of CrowdStrike products mapped with the types of workloads they manage (for example, servers, workstations, containers). With workload mapping, you can correctly count license usage and ensure compliance. Select a record in the list to view its details. For more information on creating a new product workload mapping, see Create a product workload mapping for CrowdStrike products.

- **CrowdStrike raw usage**

  View the list of workloads with their metric types. Select a record in the list to view its details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Software spend detection**
  - **Transaction imports**

    View the list of imported spend transactions to track the outcome of each import, verify how many rows were inserted or ignored, and identify imports that require investigation. For more information, see Import financial transactions.

  - **All transactions**

    View the consolidated list of all spend transactions that have been imported or manually created in the Software Asset Workspace. Use this list to review the state of each transaction, verify how it was labeled, and identify transactions that require correction. For more information, see Managing software spend in the Software Asset Workspace.

- **Content suggestions**
  - **Part number suggestions**

    View Content Service suggestions for your custom publisher part numbers (PPN). For more information, see Custom publisher part numbers (PPN).

  - **Normalization suggestions**

    View Content Service normalization suggestion records that are created for discovery models. For more information, see Normalization suggestions for discovery models.

- **Software asset success**
  - **Software maturity**

    View the list of Software Asset Management maturity item details. For more information, see View all maturity items for Software Asset Management.

  - **Success goals**

    Create success goals to track the success of your Software Asset Management application and view the list of created success goals. For more information, see Create success goals for Software Asset Management.

  - **Success activities**

    Create success activities to track the success of your goals and view the list of already created ones. For more information, see Create success activities for Software Asset Management.

  - **Success categories**

    Create success categories to add categories to your success goal and view the list of already created ones. For more information, see Create a success goal category for software assets.

  - **All active value builder tasks**

    Create Value builder tasks for publisher packs that aren't being fully used and view the list of already created ones. For more information, see Create a Value builder task.

  - **My value builder tasks**

    Create Value builder tasks and view the list of tasks assigned to you. For more information, see Value builder and Create a Value builder task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Cloud cost simulator - Settings**

  View the simulation settings, that is, the cost of moving your on-premise resources to the cloud environment. You can also create Cloud Cost Simulator settings. For more information, see Cloud cost simulation.

- **IBM ASP integration**
  - **Daily aggregated peak usage**

    View the highest daily sub capacity and full capacity usage of your IBM software products based on the edition, license metric, domain, and region of each product. For more information, see View the daily aggregated peak usage of your IBM software products.

  - **Daily high water mark usage**

    View the breakdown for the highest daily usage of your IBM software products by physical host based on both the edition and license metric of each product. For more information, see View devices with the highest daily usage of your IBM software products.

  - **Product classification**

    View the product classifications for all IBM components that are installed in your environment. These product classifications enable you to track and manage licensing for your IBM components. For more information, see View product classifications for your IBM components.

  - **Devices to scan**

    Specify the virtual machine (VM) managers, such as VMware vCenter Servers and IBM Hardware Management Consoles (HMCs), for which you want to track IBM licenses. You can track licenses for IBM software that is discovered within these specified VM managers only. For more information about updating the VM managers, see Specify VMMs for IBM licenses.

  - **Device settings**

    To improve the accuracy of your IBM license calculations, verify the meta data for the physical hosts that your IBM software is installed on. Update any meta data that is incorrect or out of date. For information about updating meta data, see Verify the meta data for your IBM hosts.

- **IBM ILMT V2 integration**
  - **Peak consumption by product**

    View the highest sub capacity and full capacity usage of your IBM software products based on the product name and the discovery model. For more information, see View the peak usage of your IBM software products.

  - **Peak consumption breakdown by device**

    View the breakdown for the highest sub capacity and full capacity usage of your IBM software products by physical host based on the discovered device. For more information, see View the peak usage of your IBM software products by device.

  - **ILMT discovered computer**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View details for the discovered device including the server name, server id, server type, hardware model, hardware serial number, hardware vendor, total processor, and CMDB computer. For more information, see View the devices that are running your IBM software products.

- **Engineering apps integration**
  - **License server**

    View a list of all the license management servers that OpenLM or Open iT connect with to get data into your ServiceNow instance. Details on license management servers such as the type of the server, the name of the server, the status of the server, and the last connection time are also provided.

  - **Discovered engineering licenses**

    View a list of all the discovered and normalized software for your engineering applications.

  - **Session details**

    View a list of users who are currently using the product. The list shows the number of days and hours being used per user. Select a record in the list to view its details.

  - **Daily peak concurrent usage**

    View a list of simultaneous users or devices accessing a specific application. Concurrent licenses can be floating, token, or network types. For more information, see Software license metrics.

  - **User denials**

    View a list of users that are denied licenses to products. Select a record in the list to view its details.

  - **Application product map**

    View a list of mappings of the discovered file names to software products for content resolution.

  - **Unrecognized publisher integration map**

    View or create unrecognized publisher-to-subscription integration mappings. You should create these mappings when the content resolver doesn't automatically recognize a specific publisher. For more information, see Create an unrecognized publisher integration mapping.

- **SAM implementation - Published products**

  View the list of software products published in a phase-wise implementation of Software Asset Management. For more information, see Manage phase-wise Software Asset Management implementation.

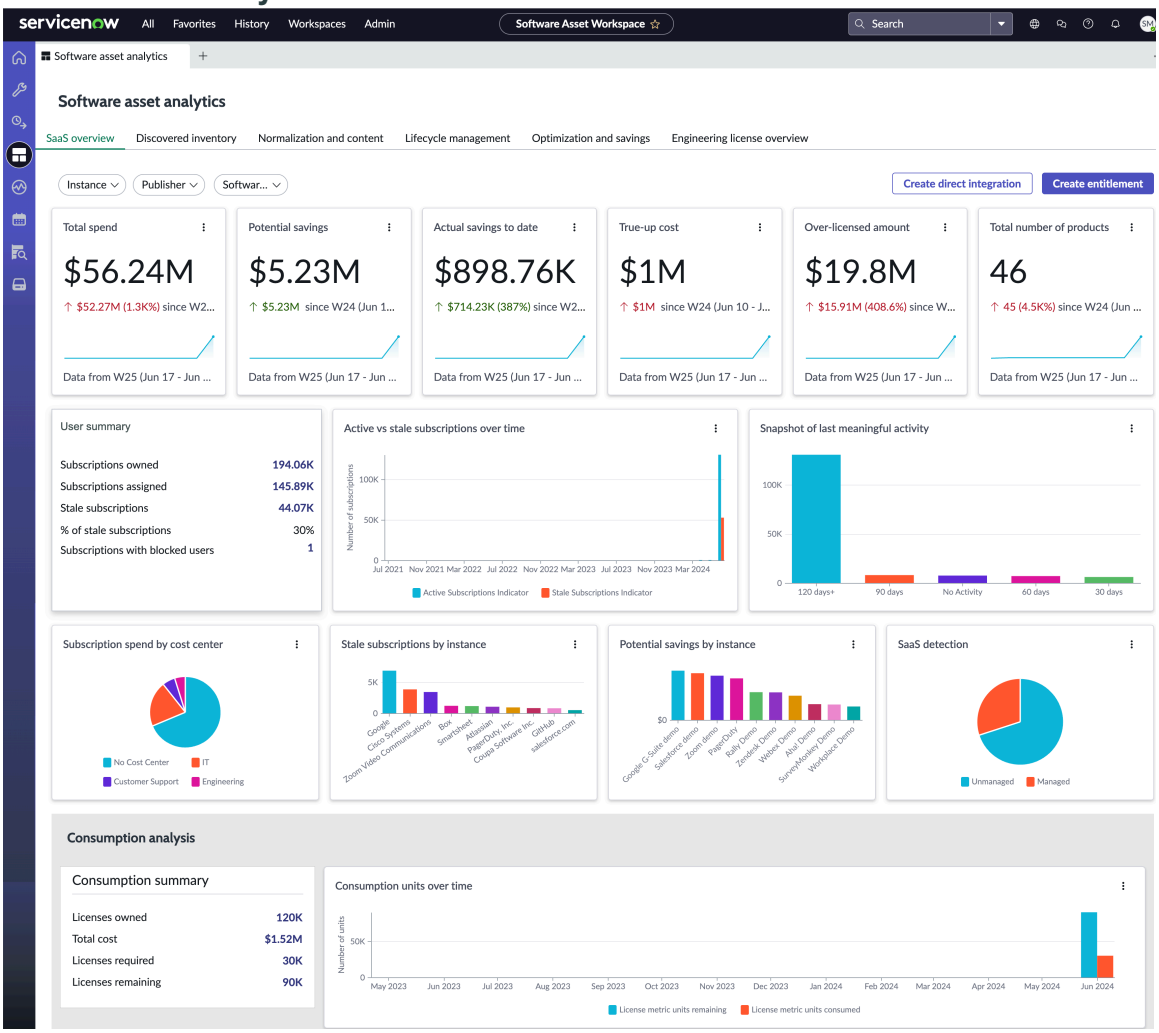
Software asset analytics view

The unified and streamlined dashboards in the Software asset analytics view in the Software Asset Workspace enable you to track your performance and view your analytics.

You can access the Software asset analytics view by navigating to **Software Asset Workspace** > **Software asset analytics**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software asset analytics view



The Software asset analytics view includes the following dashboards:

- SaaS overview: View all SaaS related analytics, create direct integration profiles, create entitlements, and view consumption analysis and details of various publishers.
- Discovered inventory: View your licensable discovered software and devices.
- Normalization and content: View normalization and Content Service trend charts.
- Lifecycle management: Review and track the end of life (EOL) software products in your asset estate.
- Optimization and savings: View metrics on how to maximize and save costs on your software assets. The dashboard also displays licensing optimizations for third-party publishers such as Microsoft, Red Hat, Adobe, and SAP.
- Engineering License Overview: View all your engineering applications license position and usage.
- Cloud cost simulator: Compare and evaluate the estimated costs of migrating your on-premises resources to the cloud for each cloud environment.

SaaS overview dashboard in workspace

View all SaaS related analytics for pure SaaS, Microsoft Office 365, and Adobe Cloud in the SaaS overview dashboard in the Software asset analytics view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Optimize your organization's cost on SaaS by analyzing the subscription usage, cost, and compliance for your SaaS applications on the SaaS overview dashboard. You can also view compliance analysis results related to Microsoft Office 365 and Adobe Cloud.

Note: The SaaS overview dashboard is only visible if you activate the Software Asset Management - SaaS License Management plugin from ServiceNow Store.

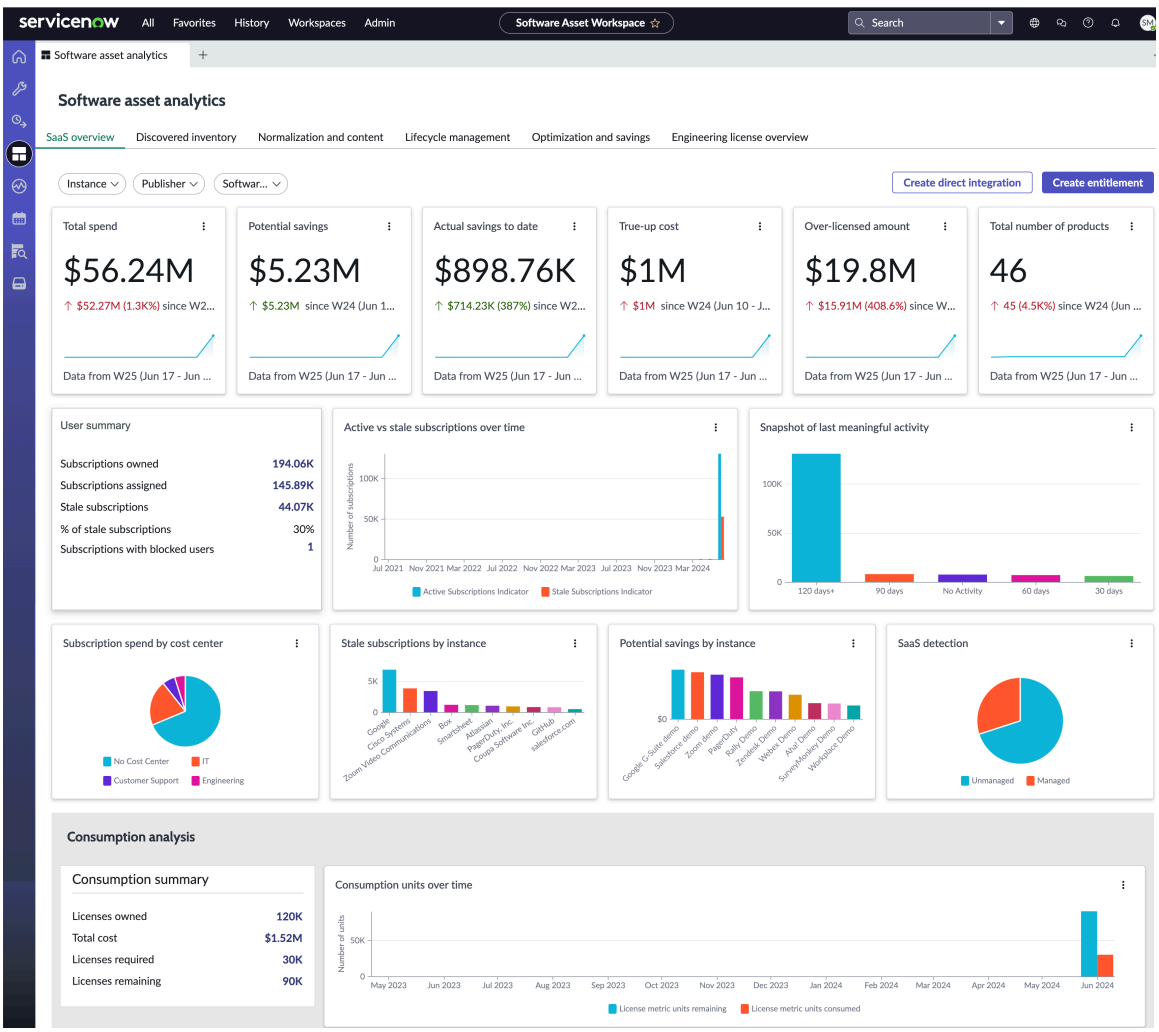
You can filter the dashboard by instance, publisher, software model, or domain. Select any report to see more information.

Note: The Domain filter narrows your results based on the domain that you select. The default value for the domain filter is global. You can select a domain at any given time for widgets to reflect the selected domain. After you clear the selected domain, it defaults back to global. The Domain filter appears on the screen only if the following plugins are installed:

- Domain Support - Domain Extensions Installer (com.glide.domain.msp_extensions.installer)
- Performance Analytics - Domain Support (com.snc.pa.domain_support)

You can access the SaaS overview dashboard by navigating to **Workspaces** > **Software Asset Workspace** > **Software asset analytics**.

SaaS overview dashboard



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SaaS overview dashboard metrics

Report	Source	Description
Total spend	License Metric Results [samp_license_metric_result]	Total cost of all active subscription software entitlements.
Potential savings	Removal Candidate [samp_sw_reclamation_candidate]	Potential costs saved if you reclaim unused subscriptions.
Actual savings to date	Removal Candidate [samp_sw_reclamation_candidate]	Total yearly savings for all subscription software. This value is calculated as the total savings from closed complete reclamation candidates.
True-up cost	License Metric Results [samp_license_metric_result]	Cost to have the number of rights you own match the number of rights you've assigned to users. This metric helps to verify that your organization is paying for all the rights that your organization is using.
Over-licensed amount	License Metric Results [samp_license_metric_result]	Cost of licenses owned but not being used.
Total number of products	Software Subscription [samp_sw_subscription]	Total number of products, including products automatically detected from imported financial transactions and products manually added to transactions.
User summary Subscriptions Owned	Software Entitlement [alm_license]	All active entitlements with the license type as subscription.
User summary Subscriptions Assigned	Software Subscription [samp_sw_subscription]	Total number of assigned rights for SaaS software models.
User Summary Stale subscriptions	Software Subscription [samp_sw_subscription]	Number of subscriptions that don't meet the usage requirements defined by the reclamation rules.
User summary Percent of stale subscriptions	Software Subscription [samp_sw_subscription]	Percentage of subscriptions that don't meet the usage requirements defined by the reclamation rules. This percentage is calculated as the number of stale rights divided by the total number of assigned rights.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SaaS overview dashboard metrics (continued)

Report	Source	Description
User summary Subscriptions with blocked users	Software Subscription [samp_sw_subscription]	Number of subscriptions that are consumed by users that have their access blocked by the admin due to security issues. **Note:** Currently, the Blocked users report is supported only for Microsoft 365.
Active vs stale subscriptions over time	Software Subscription [samp_sw_subscription]	Graphical representation of actively used vs stale subscriptions over a given time period.
Snapshot of last meaningful activity	Software Subscription [samp_sw_subscription]	Distribution of users based on their subscription software usage behavior. Use this data to identify the users with the highest software usage and determine the most appropriate threshold for your software reclamation rules. This report displays the data if there's no activity, for 30 days, and for 120 or more days.
Subscription spend by cost center	Software Entitlement [alm_license]	Total cost of all active subscription software entitlements by cost center.
Stale subscriptions by instance	Removal Candidate [samp_sw_reclamation_candidate]	Total number of stale subscriptions for each subscription profile. If you have multiple profiles for the same subscription software, this report displays each profile separately.
Potential savings by instance	Removal Candidate [samp_sw_reclamation_candidate]	Potential costs saved for each subscription profile when you reclaim unused subscriptions.
SaaS detection	SaaS URL Usage Applications [saas_url_usage]	Number of SaaS applications or percentage of the total applications that are managed and unmanaged. • **Managed**: A software model exists for a product. • **Unmanaged**: A software model doesn't exist for a product.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SaaS overview dashboard metrics (continued)

Report	Source	Description
		Important: To view this chart, you must do the following: • Request and install the latest version of the Software Asset Management -SaaS License Management application from the ServiceNow Store. For more information, see Request SaaS License Management. • Install the Agent Client Collector for Visibility Content (ACC-VC) product version 1.9.0 or later. For more information, see Agent Client Collector. For more information, see the SaaS detection report.
Consumption summary Total units	Subscription Consumption Summary [sam_saas_consumption_summary]	Total number of software units that you've purchased across all active entitlements for the software model.
Consumption summary Total cost	License Metric Results [samp_license_metric_result]	Total cost of the software units across all active entitlements for the software model.
Consumption summary units consumed	License Metric Results [samp_license_metric_result]	Number of software units that you've consumed. Unit of measure for the software units that can be consumed.
Consumption summary units remaining	License Metric Results [samp_license_metric_result]	Number of software units that haven't been consumed.
Consumption units over time	License Metric Results [samp_license_metric_result]	Graphical representation of the number of software units consumed vs the number of software units that aren't consumed over a period.

Discovered inventory dashboard

View your licensable discovered software and devices on the Discovered inventory dashboard in the Software asset analytics view of Software Asset Workspace.

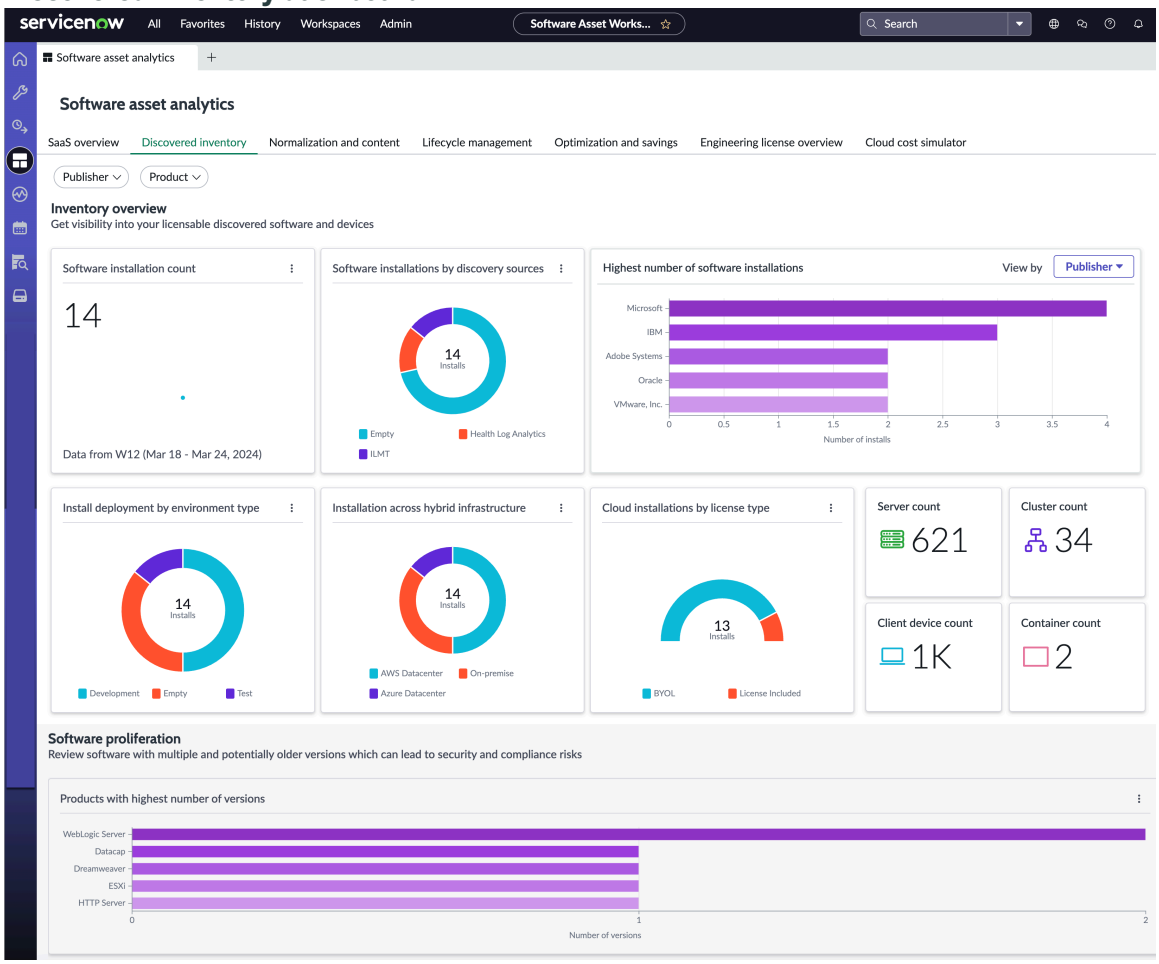
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Discovered inventory dashboard enables you to view all your licensable discovered software and devices. This dashboard also provides an insight into software products with multiple and potentially older versions that can result in security and compliance risk.

You can filter the count of installations based on a publisher or product. Select any report to see more information on software installations.

You can access the Discovered inventory dashboard by navigating to **Workspaces** > **Software Asset Workspace** > **Software asset analytics** > **Discovered inventory**.

Discovered inventory dashboard



Discovered inventory dashboard metrics

Report	Source	Description
Software installation count	Software Installation [cmdb_sam_sw_install]	Number of normalized and not normalized installs. For more information on normalized installations, see Normalization statuses.
Software installations by discovery sources	Software Installation [cmdb_sam_sw_install]	Total number of software installations grouped by discovery sources.
Highest number of software installations	Software Installation [cmdb_sam_sw_install]	The highest number of software installations for different products or

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Discovered inventory dashboard metrics (continued)

Report	Source	Description
		publishers. You can view the count of installations by publisher or product.
Install deployment by environment type	Software Installation [cmdb_sam_sw_install]	Number of software deployments grouped by the type of environment.
Installation across hybrid infrastructure	Software Installation [cmdb_sam_sw_install]	Number of installations grouped by the type of infrastructure.
Cloud installations by license type	Software Installation [cmdb_sam_sw_install]	Number of cloud installations grouped by license type.
Server count	Server [cmdb_ci_server]	Number of discovered servers.
Cluster count	Cluster [cmdb_ci_cluster] Windows Cluster [cmdb_ci_win_cluster] UNIX Cluster [cmdb_ci_unix_cluster] VMware vCenter Cluster [cmdb_ci_vcenter_cluster] Hyper-V Cluster [cmdb_ci_hyper_v_cluster] Nutanix Cluster [cmdb_ci_nutanix_cluster]	Number of discovered clusters.
Client device count	Computer [cmdb_ci_computer]	Number of discovered computers.
Container count	Docker Container [cmdb_ci_docker_container]	Number of discovered Docker containers.
Products with highest number of versions	Software Discovery Models [cmdb_sam_sw_discovery_model]	Software products with the highest number of versions in descending order.

Normalization and content dashboard

View normalization trend charts on the Normalization and content dashboard, which is integrated with Performance Analytics in Software Asset Workspace.

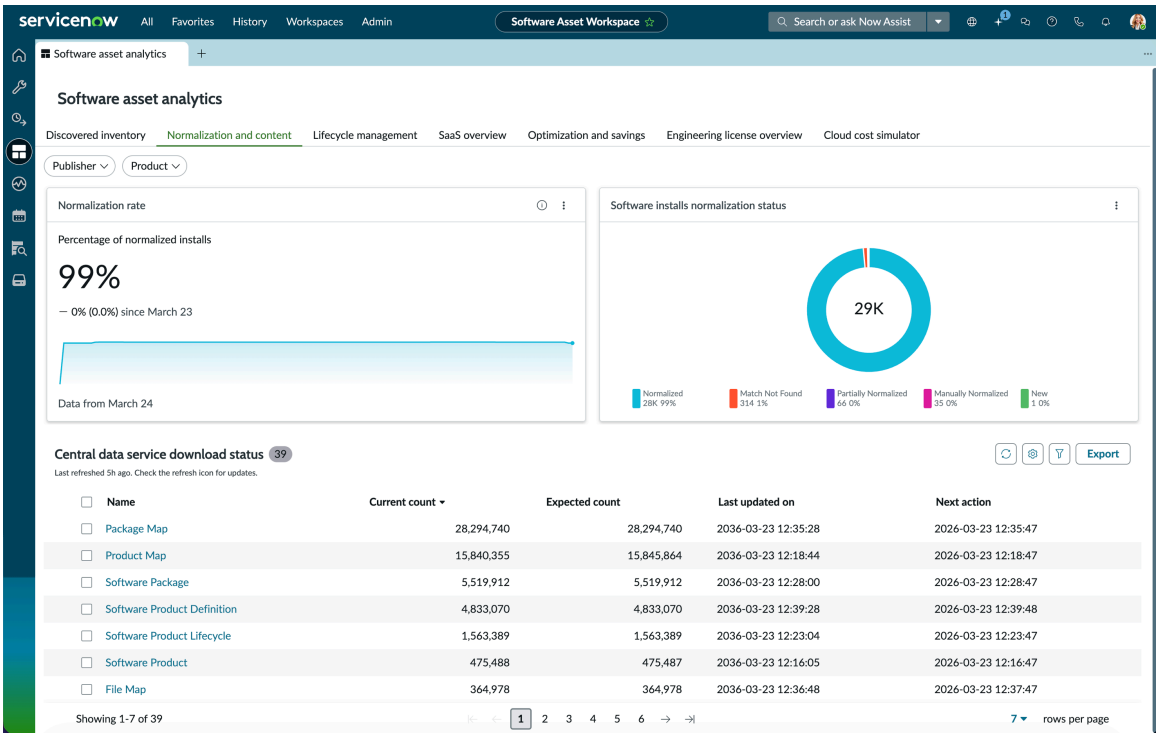
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Normalization chart results are updated daily when the *SAM - Discovery Model Normalization* job is run.

You can filter the count of installations based on a publisher or product by using the Publisher or Product filter.

You can access the Normalization and content dashboard by navigating to **Workspaces** > **Software Asset Workspace** > **Software asset analytics** > **Normalization and content**.

Normalization and content dashboard



Normalization and content dashboard metrics

Report	Source	Description
Percentage of normalized installs	Software Discovery Models [cmdb_sam_sw_discovery_model]	The percentage of fully normalized software installations out of the total software installations. You can view the percentage of installations by using the filter publisher or product.
Software installs normalization status	Software Discovery Models [cmdb_sam_sw_discovery_model]	Count of software installations based on the normalization status. Select a normalization status on the donut chart to view the list of discovery models along with the installation count for each discovery model. You can further select

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Normalization and content dashboard metrics (continued)

Report	Source	Description
		a discovery model to view the list of software installations. The report for this widget is populated only once the following daily scheduled jobs have run successfully: • *SAM - Normalize discovery models using content library rules* • *SAM - Daily Job*

Central Data Service Download Status

The Central Data Service Download Status related list is updated daily when the *SAM - Central Data Service Download Status* job is run.

Central Data Service Download Status fields

Field	Description
Name	Table name from which the content is pulled.
Current count	Number of records in the table.
Expected count	Expected number of records in the table.
Last updated on	Last date and time the data was pulled.
Next action	Next scheduled date and time to pull data from the table.

Lifecycle management dashboard

Review and track the end of life (EOL) software products in your asset estate to reduce risks associated with software products that are reaching or have reached EOL.

The Lifecycle management dashboard displays reports on product life cycles, the current and past EOL product life cycles, and the upcoming EOL product life cycles for the next 18 months. You can also view EOL workflow status and workflow action.

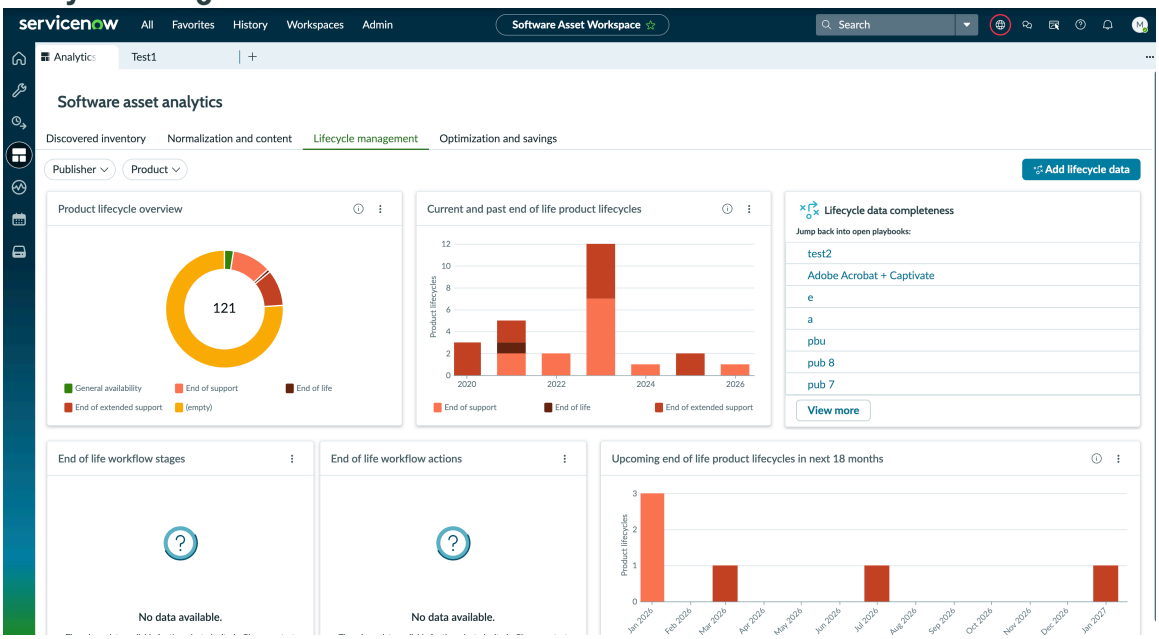
Note: The Lifecycle management dashboard is only visible if you activate the Software Asset Management Professional plugin from ServiceNow Store.

Access the Lifecycle management dashboard by navigating to **Workspaces** > **Software Asset Workspace** > **Software asset analytics** > **Lifecycle management**.

You can filter the dashboard reports based on a publisher or product. Select any report to view more information on product life cycles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Lifecycle management dashboard



Lifecycle management dashboard metrics

Report	Source	Description
Product lifecycle overview	Software Lifecycle Report [sam_sw_product_lifecycle_report]	Product life-cycle details for all the software products installed in your environment. Select a life-cycle phase to determine the current phase of the software products in your environment.
Current and past end of life product lifecycles	Software Lifecycle Report [sam_sw_product_lifecycle_report]	Software product life-cycles in your environment that are based on their EOL timelines. The chart displays data from the current year and the previous 15 years.
Lifecycle data completeness	Software Lifecycle Playbook [sam_sw_lifecycle_playbook]	Lists all the open lifecycle playbooks that have been created. You can open any of the existing playbooks to update or complete them. You can select **Add to lifecycle data** to create a playbook for lifecycle data. For details on creating the playbook, see Create a comprehensive lifecycle

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Lifecycle management dashboard metrics (continued)

Report	Source	Description
		report using a guided experience.
End of life workflow stages	Software EOL Request [samp_sw_eol_request]	EOL workflows grouped by the following stages: • Open • Analysis • Action initiated • Completed • Cancelled
End of life workflow actions	Software EOL Request [samp_sw_eol_request]	EOL workflows grouped by action initiated: • Pending: Action is pending. • Remove EOL software: Remove the EOL software product from the asset inventory. • Upgrade: Upgrade to the latest or the supported software version. • Purchase support: Purchase additional support for maintenance. • Move to Azure: Migrate to Microsoft Azure. This action is available only for Microsoft products. • Accept risk: Accept the risks associated with the EOL software. **Note:** This chart doesn't include EOL workflows that are in the Draft or Cancelled stage.
Upcoming end of life product lifecycles in next 18 months	Software Lifecycle Report [sam_sw_product_lifecycle_report]	Software product life-cycles in your environment that are reaching EOL in the next 18 months.

Managing workflow to reduce risks associated with EOL software

Tracking product life cycles enables you to manage software products that are reaching or have already reached EOL, end of support (EOS), or end of extended support.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can take required action for your EOL software products by using the Software Product Lifecycle report. The report opens when you select the **Upcoming end of life product lifecycles in next 18 months** or **Current and past end of life product lifecycles** report on the Lifecycle management dashboard. You can create an EOL request for the software products that have the Current phase as End of Support, End of Extended Support, or End of Life. For more details, see Create an end of life workflow request for your software products.

Optimization and savings dashboard in workspace

Use the Optimization and savings dashboard to view actual and potential cost savings for your software assets. In addition, view the recommended licensing optimizations for third-party software publishers, including Microsoft, Red Hat, Adobe, and SAP. Use this information to downgrade or reclaim licenses so that you can optimize your licensing costs.

Note: You can use the Domain filter to narrow your results based on the domain that you select. The default value for the Domain filter is **global**. You can select a domain at any given time for widgets to reflect the selected domain. If you clear the selected domain, it defaults back to **global**.

The Domain filter appears on the screen only if the following plugins are installed:

- Domain Support - Domain Extensions Installer (com.glide.domain.msp_extensions.installer)
- Performance Analytics - Domain Support (com.snc.pa.domain_support)

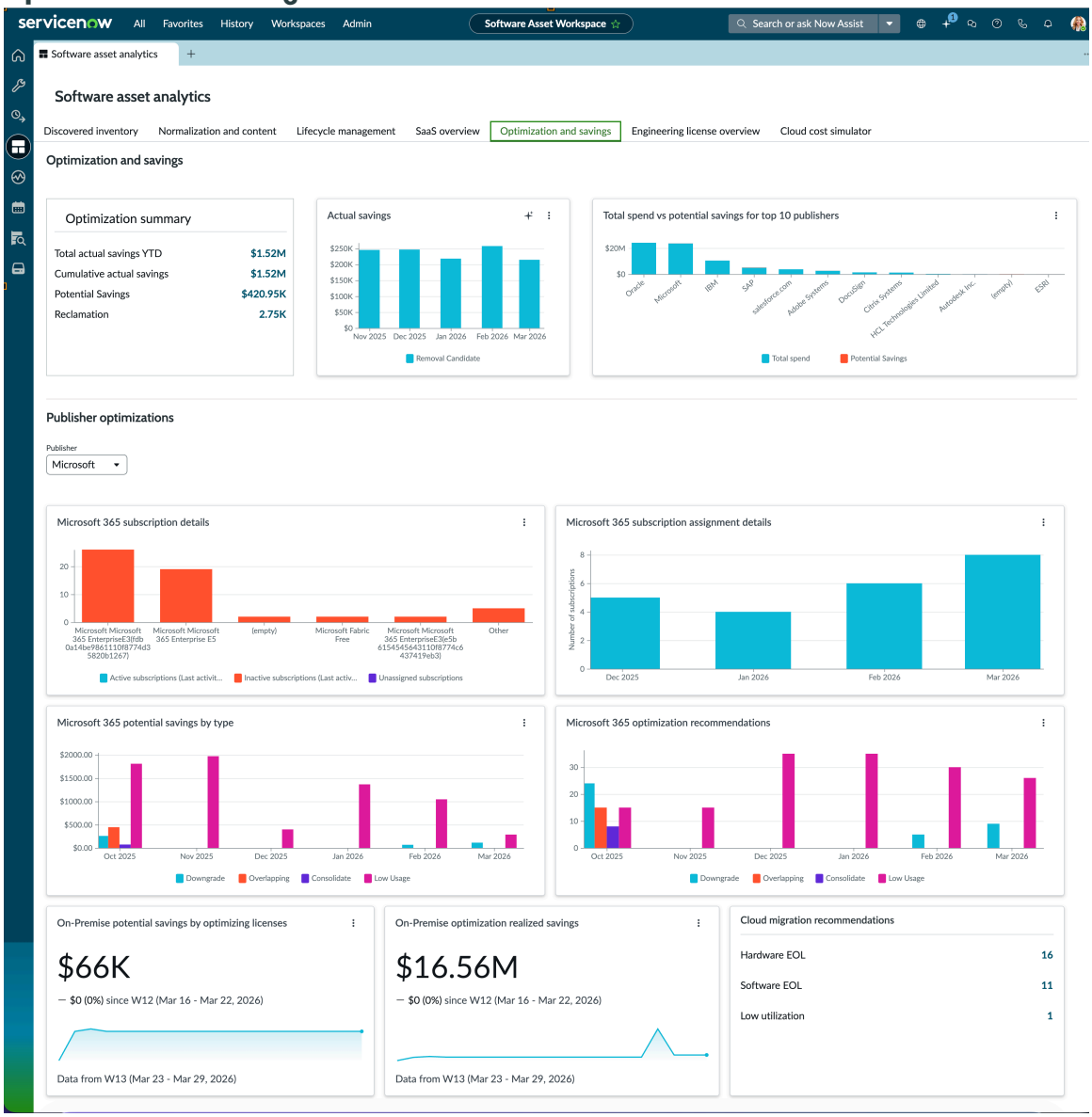
You can access the Optimization and savings dashboard by navigating to **Software asset** > **Software Asset Workspace** > **Software asset analytics** > **Optimization and savings**.

View the licensing optimizations for a publisher by selecting the publisher from the **Publisher** drop-down list.

- Publisher optimizations for SAP
- Publisher optimizations for Red Hat
- Publisher optimizations for Microsoft
- Publisher optimizations for Adobe

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Optimization and savings dashboard



Optimization and savings dashboard metrics

Report	Source	Description
Total actual savings YTD	Removal Candidate [samp_sw_reclamation_candidate]	State is Closed Complete and closed on this year.
Cumulative actual savings	Removal Candidate [samp_sw_reclamation_candidate]	State is Closed Complete and the sum of potential savings.
Potential savings	Removal Candidate [samp_sw_reclamation_candidate]	State is NOT closed complete OR closed canceled OR closed skipped and the sum of potential savings.
Reclamation	Removal Candidate [samp_sw_reclamation_candidate]	Active is true.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Optimization and savings dashboard metrics (continued)

Report	Source	Description
Actual Savings	Removal Candidate [samp_sw_reclamation_candidate]	Five months of history of closed complete reclamation candidates and their corresponding savings.
Total spend vs. potential savings top 10 publishers	Product Result [samp_product_result] and Removal Candidate [samp_sw_reclamation_candidate]	History of top 10 publishers sorted by highest spend and their corresponding potential savings.

Engineering License overview dashboard in workspace

Monitor and gain insights into your engineering applications license position and usage by viewing product usage reports in the Engineering license overview dashboard.

The Engineering license overview dashboard displays reports on normalized products and publishers that belong to engineering applications such as AutoCAD, GIS.

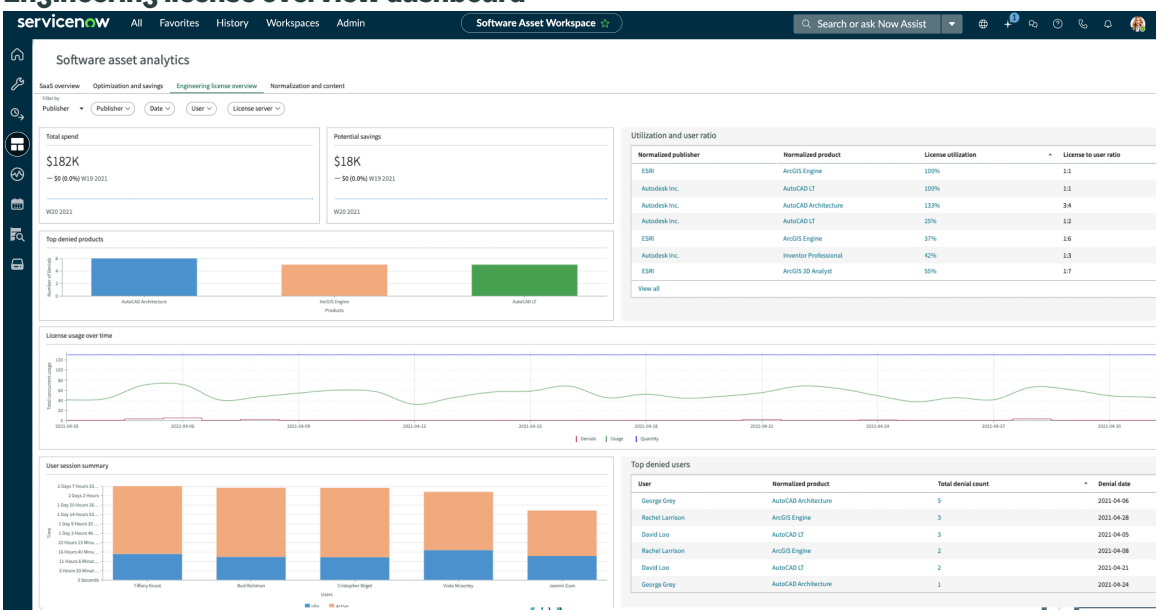
To narrow your results based on products or publishers across all tabs, use the filter in the left-hand corner of the dashboard. You can further narrow your results based on the date, user, or license server.

Note: Only products and publishers that belong to engineering applications and are listed in the Engineering Application License [samp_eng_app_license] table appear in the filter. If no product or publisher is selected, the cumulative data for all products and publishers that belong to engineering applications appear.

All the reports are updated daily or whenever a new reconciliation result is available.

You can access the Engineering license overview dashboard by navigating to **Software asset** > **Software Asset Workspace** > **Software asset analytics** > **Engineering license overview**.

Engineering license overview dashboard



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Engineering license overview dashboard metrics

Report	Source	Description
Total spend	Product Result [samp_product_result]	Total cost of all entitlements for all products.
Potential savings	Removal Candidate [samp_sw_reclamation_candidate]	Cost saved if removal candidates are reclaimed.
Top denied products	Engineering Application Denial [samp_eng_app_denial]	Top products that are denied to users as these products have reached their peak concurrent usage.
Utilization and user ratio	Engineering Application Utilization and User Ratio [samp_eng_utilization_user_ratio]	Ratio of license utilization, for normalized products and publishers, to the number of users using those licenses. • Normalized publisher • Normalized product • License utilization: Percentage of peak consumption of the product against number of rights. • License to user ratio: Ratio of rights using this license to users using this product over the period of 90 days rights.
License usage over time	Engineering Application License [samp_eng_app_license] Engineering Application Concurrent Usage [samp_eng_app_concurrent_usage] Engineering Application Denial [samp_eng_app_denial]	The total number or quantity of all available licenses; not just the active products but all the products. • The blue line represents the total number of licenses allocated to a product or a publisher • The green line indicates the concurrent usage of the licenses. • The red line indicates denials or if and when the concurrent usage peaks.
User session summary	Engineering Application Usage Summary [samp_eng_app_usage_summary]	Duration of time spent by users (idle vs active) on products. Only the top 5 users with more idle duration appear on the report.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Engineering license overview dashboard metrics (continued)

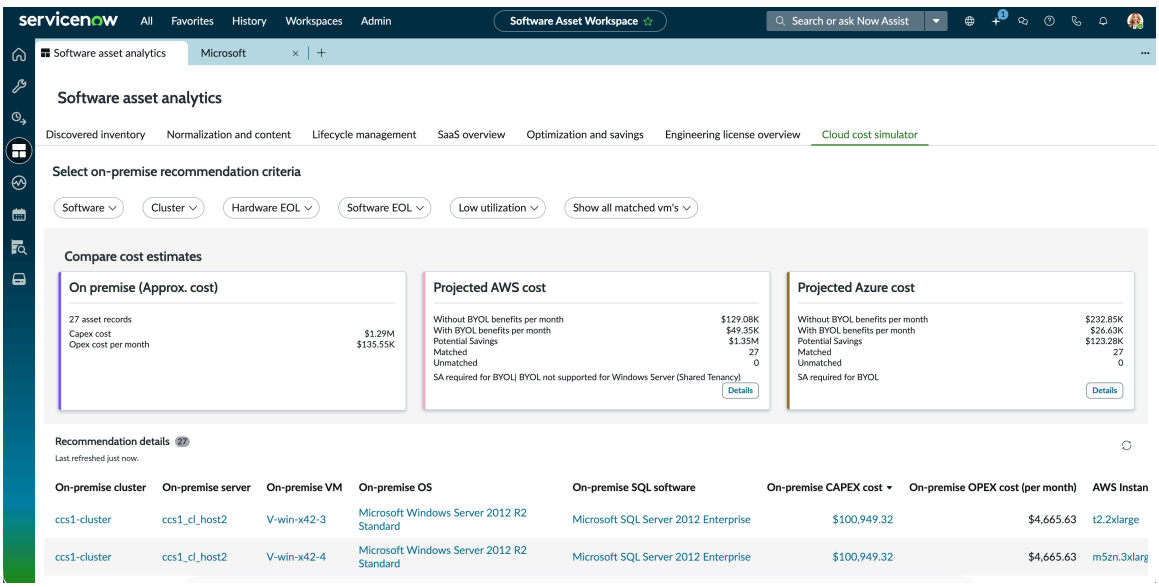
Report	Source	Description
		Note: Idle is the aggregate sum on Total idle duration column and Active is the aggregate sum on Total session duration column.
Top denied users	Engineering Application Denial [samp_eng_app_denial]	Top users that are denied licenses to products.

Cloud simulator dashboard

Compare and evaluate the estimated costs of migrating your on-premises resources to the cloud for each cloud environment.

Access the Cloud cost simulator dashboard by navigating to **Software Asset Workspace** > **Software asset analytics** > **Cloud cost simulator**.

Cloud cost simulator dashboard



Use filters on your on-premises resources to specify a criteria for receiving cost recommendations for cloud migration.

- Software
- Cluster
- Hardware EOL
- Software EOL
- Low utilization
- Show all matched VMs

Note: You can also use the Optimization and savings dashboard to view recommendations without a filter.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The recommendations are listed based on the criteria you specified. Virtual machine records that meet the criteria you specified are listed. In addition to the on-premises cost listed for each virtual machine, the Software Asset Management application automatically lists the most optimal price match for the corresponding virtual machines on cloud: AWS and Microsoft Azure.

You can view the total cost of all the on-premises records as well as compare the individual cost for AWS and Microsoft Azure in the Compare cost estimates section.

Once you decide on the cloud environment that you want to migrate to, click **Change Request** to initiate your cloud migration request.

Compare cost estimates

Capex cost	Calculated hardware cost after including depreciation
Opex cost per month	Calculated from software entitlements: Windows Server, SQL Server, software assurance, and extended security updates costs. Also calculated from configuration item (CI) rate cards that are created by the user.
Without BYOL benefits per month	Cost of the instance (compute cost, OS cost, and software cost) plus storage cost.
With BYOL benefits per month	Cost of the instance cost (compute Cost) plus storage cost.
Potential savings	Total savings if all recommendations are applied.
Matched	Number of virtual machines on the cloud that match the on-premises virtual machines.
Unmatched	Number of virtual machines on the cloud that don't match the on-premises virtual machines.

Success portal view in Software Asset Workspace

Use the Success portal view in Software Asset Workspace to track the progress of your Software Asset Management (SAM) application with success goals, assign activities to track the success of your goals, run health checks on your software, maximize the usage of your SAM capabilities, and mature your SAM program with predefined maturity items.

Success portal helps you perform the following actions:

- **Track the progress of your SAM application through success goals**

  Success goals help you analyze the value that you get out of your software licenses and calculate your projected savings. Create success goals for the licenses that you want to track. For more information about creating a success goal, see Create success goals for Software Asset Management.

- **Track the progress of your success goals**

  Track the success of your goals by creating success activities for the goals. For more information, see Create success activities for Software Asset Management.

- **Perform a health check on your software**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Run health checks to review the health of licenses, permissions, and configurations to get the best out of each software suite. For more information, see Health check.

- **Keep your software up to date using Value builder tasks**

  Get an overview of which software upgrades, publisher packs, and integrations you must set up with Value builder tasks. These tasks are created automatically, but you can create your own as necessary. For more information, see Value builder.

- **Mature your SAM program with predefined maturity items**

  The program maturity is categorized into Crawl, Walk, and Run stages to help you improve the value return of your SAM program, including processes, features, functionalities, and capabilities within your organization. You can link these maturity items to Success goals and Value builder tasks to track and report on the improvements of your SAM application over time. For more information, see View all maturity items for Software Asset Management.

Email notifications are sent when the following conditions are met:

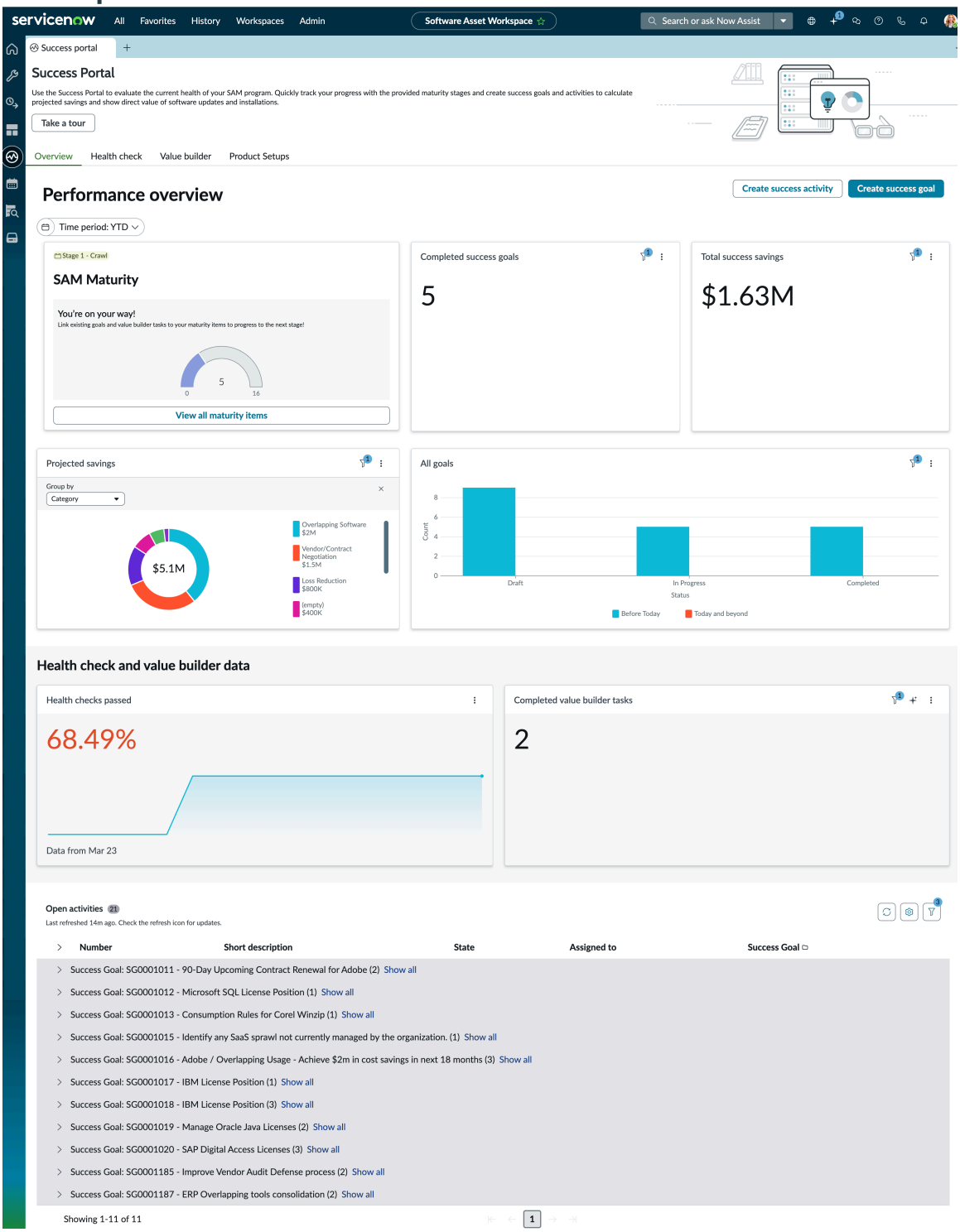
- To a group, when a success goal is assigned to that group.
- To an owner, when a success goal is assigned to that owner.
- To an owner, when a success goal is marked as Pending Review.
- To an assigned user or an assignment group, when a success activity is assigned.

Access the Success portal view by navigating to **Software Asset Workspace** > **Success portal**.

The Success portal supports domain separation when the Performance Analytics - Domain Support plugin (com.snc.pa.domain_support) is activated. To filter the data by domain, select a domain at the top of the dashboard.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Success portal view



Success portal dashboard

Widget	Description
SAM maturity	Current stage of your SAM program maturity such as the Crawl, Walk, or Run stage. View the maturity items of each stage by selecting **View all maturity items**. For more

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Success portal dashboard (continued)

Widget	Description
	information, see View all maturity items for Software Asset Management.
Completed success goals	Total number of completed success goals.
Total success savings	Actual savings from the completed success goals.
Projected savings	Anticipated savings from the success goals are grouped by the status and category of the goal.
All goals	All success goals grouped by the following statuses: • Draft • In Progress • Pending Review • Completed • Canceled
Health check and value builder data	
Health checks passed	Percentage of successful health checks.
Completed value builder tasks	Number of value builder tasks that are completed.
Open activities	Open success goal activities.

Health check

Use the Health check dashboard to view the results of the health scan that is performed on the configurations in your Software Asset Management application.

To access the Health check dashboard, navigate to **Software Asset Workspace** > **Success portal** > **Health check**.

Important: Ensure that you've activated the Software Asset Workspace (sn_sam_workspace) store application and installed the ITAM Health Check application from ServiceNow Store to view the Health check dashboard. You must have the scan_user and sam_admin role to access this dashboard and view the health score data.

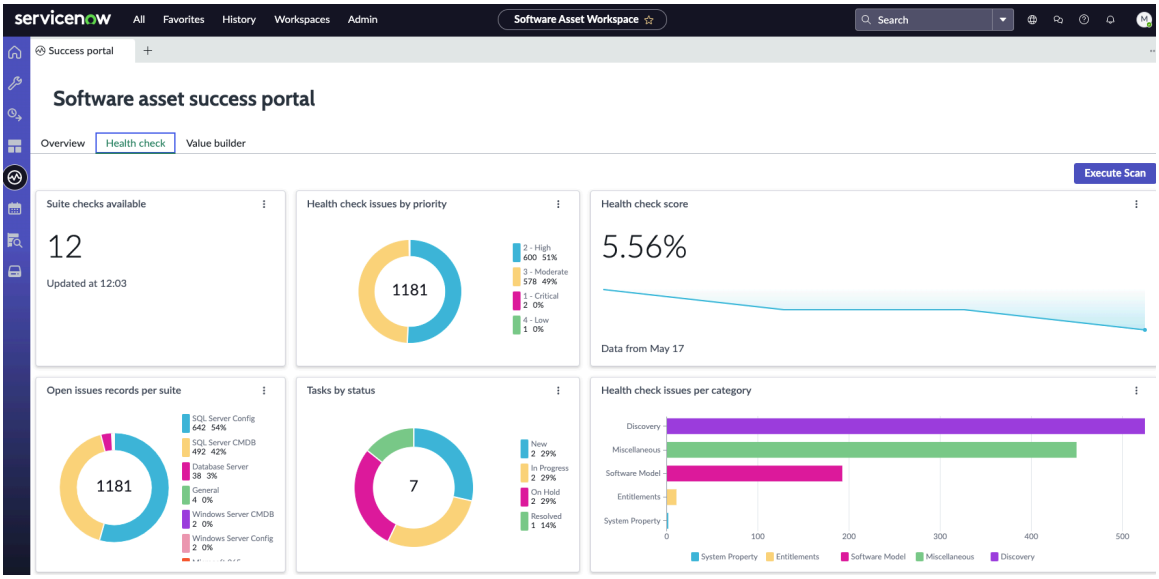
If you are on the Rome or the San Diego releases, you must execute the full scan to view the results in the base system scan dashboard. For details on executing a full scan, see Execute full scan.

Select **Domain** and choose a domain to view the health check results.

You can also perform a scan for a suite by selecting **Execute Scan**. Verify the scan result to act accordingly. For more information, see .

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Health check dashboard



Health check dashboard widgets

Widget	Description
Suite checks available	Number of checks available for the following suites: • SQL Server Config • SQL Server CMDB • Windows Server CMDB • Windows Server Config • Oracle Database • Java - Oracle • WebLogic Server - Oracle • Microsoft 365 • General
Health check issues by priority	Issues based on priority. You can choose from the following: • Low • Medium • High • Critical
Health check score	Indicates the number of successful health checks. For example, if 10 health checks were performed and only 6 health checks passed, the score would be 60%.
Open issue records per suite	The number of open records for each of the following suites:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Health check dashboard widgets (continued)

Widget	Description
	• SQL Server Config • SQL Server CMDB • Windows Server CMDB • Windows Server Config • Oracle Database • Java - Oracle • WebLogic Server - Oracle • Microsoft 365 • General
Tasks by status	The status of the tasks created in relation to the health score results. • New • In Progress • On Hold • Resolved
Health check issues per category	Categorization of issues identified as a result of the health check scan. • Discovery • Software Model • Entitlements • System Property • Miscellaneous

Related topics

Software Asset Management health check

Run a health check scan for Software Asset Management

Run a health check scan for Software Asset Management

Run a health check scan on your Software Asset Management configurations and get recommendations on fixing any errors that might exist.

Before you begin

Role required:

- sam_user
- implementation partners
- support analyst

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

You can run a health check scan to find the health score for the complete configuration of the Software Asset Management application or for a specific part of the configuration.

Procedure

1. Navigate to **Software asset** > **Software Asset Workspace** > **Success portal** > **Health check**.
2. Select the **Health check** tab.
3. Select **Execute Scan**.
4. Select the suite on which you want to run the health check scan.
5. Select **Execute** to begin the scan.
   All the checks in the selected suite get executed across your environment.
6. After the scan is complete, select **View result** to view the scan result.
   All issue records for the health checks are displayed under **Scan Findings** on the Scan Result page.
7. Select on an issue record to get more details on an error such as detailed description of the error, resolution details.
   You can create tasks and assign the tasks to individuals to act on the recommendations.
8. Create tasks and assign the tasks to individuals to act on the recommendations.
   Once the errors are fixed, you can run the scan again to see improved health scores.

Related topics

Software Asset Management health check

Health check

Value builder

Maximize the usage of your Software Asset Management application capabilities by getting insights into integrations, playbooks, and other installations.

Overview of the Value builder

The sam_user role can identify and prioritize functionalities that haven't yet been implemented or aren't being used.

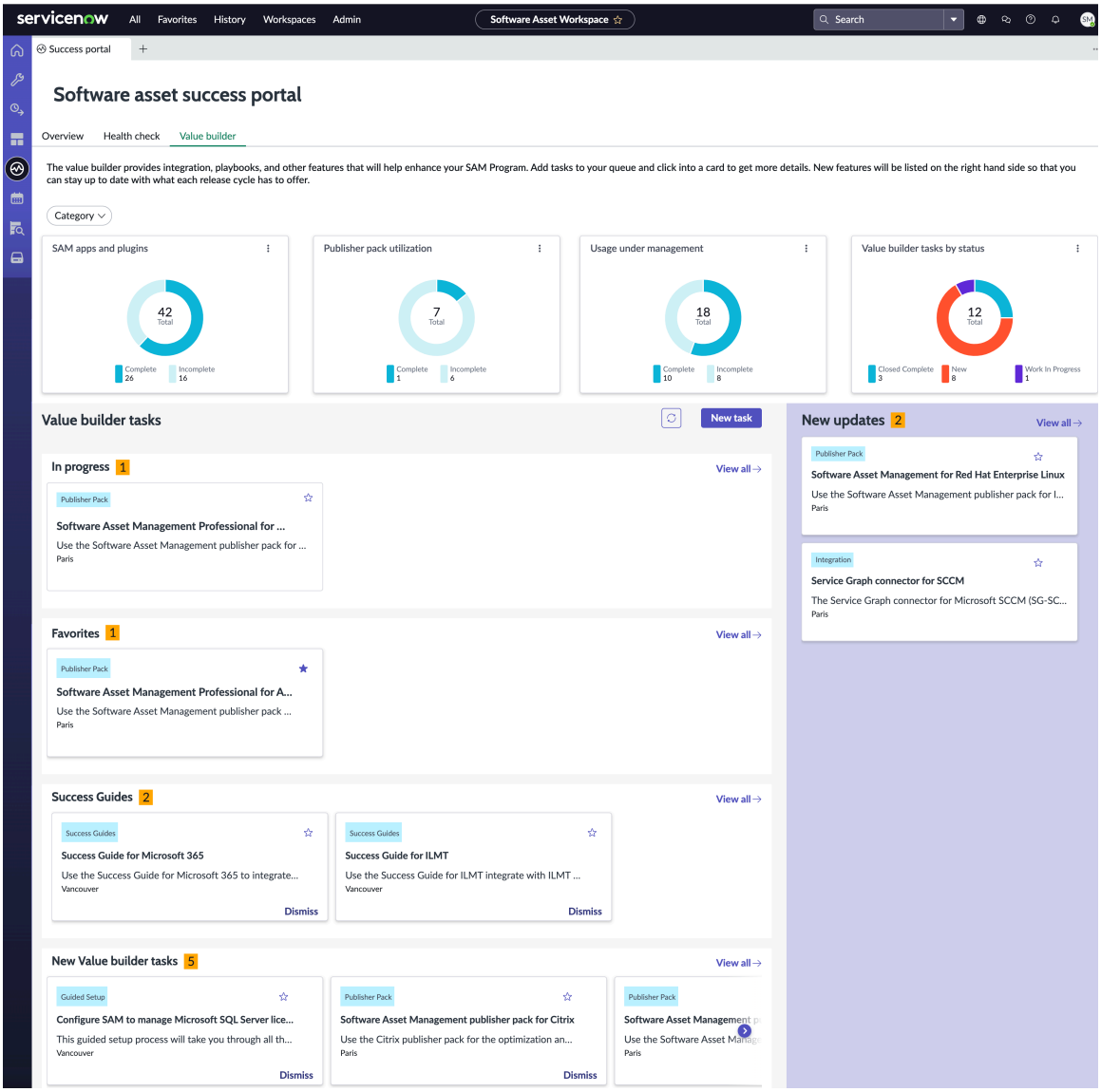
The Value builder functionality enables you to perform the following actions:

- Learn how close your instance is to maximizing the value of your Software Asset Management application.
- Track Value builder tasks that are automatically generated when publisher packs aren't fully used and are identified as incomplete. You can also manually create Value builder tasks. For details see Create a Value builder task.
- Filter the data by domain or category or you can filter by both domain and category. The filter applies to the entire dashboard, and when selected, displays only the data that matches the specific filter.
- Prioritize or increase visibility of certain tasks by marking tasks as favorites.
- Stay up to date and get a glimpse of the new features available in the upcoming release.

You can view a maximum of 15 tasks in the Value builder section. To see additional tasks, click **View all**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Value builder dashboard



Use case for Value builder

The Value builder displays four donut chart widgets to the sam_user role. Each widget shows you how far your instance is from fully using the Software Asset Management capabilities.

For example, the Publisher pack utilization widget shows five publisher packs but only four are being used in your instance. A Value builder task automatically gets created for the additional publisher pack that is not being used and appears in the New Value builder tasks section. You can prioritize this task and click the star icon to add this task to your Favorites list. If you decide not to work on this task, you can click **Dismiss** to remove it from the New Value builder tasks section.

Value builder widgets

Select a donut chart widget to take you to the list view of records. For example, if you want to view the incomplete publisher pack records, select the incomplete part in the donut chart widget.

All the widgets get refreshed and the value builder tasks are created after the following two scheduled jobs run:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- *SAM- Update value builder usage*
- *SAM- Value builder content handler*

Widget	Source	Description
SAM apps and plugins	sam apps and plugins [samp_sp_apps_and_plugins]	All Software Asset Management plugins and store applications that are available to use and how many haven't been installed on your instance. **Complete** indicates the store applications and plugins that are installed. **Incomplete** indicates the store applications and plugins that haven't yet been installed.
Publisher pack utilization	SAM Publisher Pack Utilization [samp_sp_publisher_pack_utilization]	All publisher packs that are available for use and how many are actually being used. **Complete** indicates the publisher packs that are fully used. **Incomplete** indicates the publisher packs that aren't fully used. Utilization of a publisher pack depends on a criteria. If the value is true for all three details in the **Usage details** section of a publisher pack record, namely **Plugin enabled?**, **Usage found?**, and **Entitlements created?**, then the publisher pack is considered to be fully used and is set to be complete. If the value for even one of the three entities is false, then the publisher pack is considered to be not fully used and is set to be incomplete. Value builder tasks are automatically created for incomplete publisher packs. The criteria for **Usage found?** differs for each publisher pack. For details on the specific **Usage found?** criteria for each publisher pack, see

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Widget	Source	Description
		Usage criteria for publisher packs.
Usage under management	SAM usage under management [samp_usage_under_management]	Usage of all licensable products. Usage of licensable products depends on a criteria. If the value is true for both **Usage found?** and **Entitlement created?**, the product is considered to be used. The criteria for **Usage found?** differs for each product. For **Usage Found?** to be considered complete, any one of the following entities should be detected in your instance for a product. • Discovery model • Client access record • Subscription
Value builder tasks by status	SAM Value Builder Task [samp_sp_vb_task]	All value builder tasks that are in the following states: • **New** • **In progress** • **Pending review** • **Closed complete** **Note:** Value builder tasks that are in the **Closed Skipped**state aren't displayed.
Value builder tasks (In Progress)	SAM Value Builder Task [samp_sp_vb_task]	Value builder tasks that are currently in progress.
Value builder tasks (Favorites)	SAM Value Builder Task [samp_sp_vb_task]	Value builder tasks that are marked as favorites. Click the star icon in front of a value builder task, in the Value builder task section to mark it as a favorite.
Value builder tasks (Success Guides)	SAM Value Builder Task [samp_sp_vb_task]	Value builder tasks that would enable you in accessing the Success Guides.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Widget	Source	Description
New Value builder tasks	SAM Value Builder Task [samp_sp_vb_task]	All value builder tasks that are still in the **New** state and aren't favorites.
New Updates	SAM Value Builder Task [samp_sp_vb_task]	Preview of the features in the upcoming release.

Create a Value builder task

Manually create a Value builder task for publisher packs not being fully utilized in your instance.

Before you begin

Role required: sam_admin

About this task

Value builder tasks are automatically created for all publisher packs indicated as incomplete in the Publisher pack utilization widget. However you can also manually create Value builder tasks.

Procedure

1. Navigate to **Software Asset Workspace** > **Software asset success portal** > **Value builder**.
2. Click **New task**.
   The Create New SAM Value Builder Task page appears.
3. On the form, fill in the fields.

Field	Description
Short description	Short description of the task.
Description	Detailed description of the task.
Instructions	Any specific instructions related to the task.
Number	Number assigned to the task.
Category	The category that this task belongs to.
Success Goal	The success goal that you want this task to align to.
State	The current state of the task. By default, the state is **New**.
Assigned to	Name of the user the task is assigned to.
Assignment Group	The assignment group that the assigned to user belongs to.
Work notes	Any additional notes pertaining to the task.

4. Click **Save**.
   The Value builder task is created and the state defaults to **New**.
5. Click **Start**.
   The state of the task changes to **Work In Progress**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Usage criteria for publisher packs

Description of usage criteria that indicates whether a publisher pack is being utilized or not in your instance.

This table describes the criteria used for the *Usage found* entity for each publisher pack to be identified as fully utilized. The criteria differ for each publisher pack.

Criteria for Usage found entity for publisher packs

Publisher Pack	Usage criteria	Source tables
Red Hat Enterprise Linux	Software installations	cmdb_sam_sw_install
Adobe	• Software installations • Subscriptions	• cmdb_sam_sw_install • samp_sw_subscription
Citrix	• Software installations • Client access	• cmdb_sam_sw_install • samp_sw_client_access
Microsoft	• Software installations • Subscriptions	• cmdb_sam_sw_install • samp_sw_subscription
IBM	Software installations	cmdb_sam_sw_install
Oracle	Software installations	cmdb_sam_sw_install
SAP	• SAP user • Client access	• samp_sap_system_user • samp_sap_sw_client_access
VMware	Software installations	cmdb_sam_sw_install

Success Guides

Use Success Guides, which are part of Value builder tasks, to easily find information about the tasks involved in various set ups and integrations.

The instructions in the Success Guides help you do the following:

- Track subscription licenses and proactively identify savings opportunities for Microsoft 365.For more information, see Microsoft 365 SaaS License Management success guide.
- Track and license IBM usage by enabling you to configure the connection between the ServiceNow AI Platform and IBM License Metric Tool (ILMT) or BigFix Inventory. For more information, see IBM ILMT setup success guide.

Microsoft 365 SaaS License Management success guide

Track Microsoft 365 SaaS subscription licenses in the ServiceNow Software Asset Management application and proactively identify saving opportunities for Microsoft 365.

Note: Microsoft Dynamics 365 and Power Apps haven't been covered in this guide. For details, see Integrating with Microsoft Dynamics 365 and Power Apps.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft 365 is a subscription-based product and offers various features and functionalities. For more information, see Microsoft 365 FAQs.

Microsoft 365 licensing

Microsoft 365 is a hybrid Software as a Service (SaaS) application. Licensing of Microsoft 365 depends on subscription information from the cloud and from installations on endpoint devices, such as laptops, workstations, or virtual systems.

You must gather the following information and reconcile for licensing:

- Microsoft 365 subscription users from the Microsoft Cloud.
- Local installation information from relevant endpoint devices with enough detail for correctly aligning installations to user subscriptions in the Microsoft Cloud.

Microsoft 365 saving opportunities

You can collect and analyze data from multiple sources for identifying Microsoft 365 saving opportunities. The Software Asset Management application automates this process with the base system integrations to the cloud and on-premise inventory tools. This installation data is normalized with the subscription profiles, which helps in importing Microsoft 365 or Office 365 entitlements easily.

Reconciliation automatically produces license compliance positions based on attributes and calculations included in the Software Asset Management publisher pack for Microsoft. For more information, see Identify savings opportunities.

Track subscription licenses and identify saving opportunities for Microsoft 365 by following these steps:

1. Create a Microsoft 365 integration
2. Validate subscription, installation, and usage data
3. Import Microsoft 365 subscription entitlements
4. Identify savings opportunities
5. Microsoft 365 license optimization

Create a Microsoft 365 integration

Compare Microsoft 365 user subscriptions with installation usage data for a complete license compliance position.

Before you begin

Role required: Navigate to the linked topics in each step for the required roles.

Enable the following plugins:

- Software Asset Management Professional for Microsoft (com.snc.samp.microsoft)
- Software Asset Management - SaaS License Management (sn_sam_saas_int)
-

Complete the steps in the Request Software Asset Management topic.

Procedure

1. Integrate with Microsoft 365 in the cloud for user subscription data.
   For more information, see Create a Microsoft 365 integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Configure Microsoft Power BI for gaining access to Power BI service content and APIs.
   Power BI service content and APIs help optimize your Microsoft 365 subscriptions, such as by downgrading subscriptions from Office 365 E5 to Office 365 E3. For more information, see Enable service principal authentication for Power BI read-only APIs.
3. Integrate with an inventory tool for installation usage data.
   - For integrating with Microsoft SCCM, complete the steps in the Service Graph Connector for Microsoft SCCM topic and all subtopics.
   - For integrating with ServiceNow Agent Client Collector (ACC), complete the steps in the Agent Client Collector Installation topic and all subtopics.

     Note: ServiceNow Agent Client Collector (ACC) is a separately licensed IT Operations Management (ITOM) product. For details, contact your ServiceNow account executive.

   - For integrating with Jamf for MAC OS devices, complete the steps in the Service Graph Connector for Jamf topic and all subtopics.
   - To integrate with a third-party inventory tool, complete the steps in the Software asset connections topic and all subtopics.

What to do next

Validate subscription, installation, and usage data

Validate subscription, installation, and usage data

Validate subscription, installation, and usage data before running a reconciliation for completeness and accuracy of your reports.

Before you begin

Role required: sam_admin, sam_user

Procedure

1. Validate user subscription data from the Microsoft cloud integration.

   a. Log in to your ServiceNow instance.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **Discovery** > **Software Subscriptions**.
Software Asset Workspace	Navigate to **Software Asset Workspace** > **License operations** > **User subscription** > **User subscription**.

   b. Review the data in the User Subscription table by verifying the number of Microsoft 365 subscription records.
   For more information about personalizing and filtering data, see Configure user experiences.

   - If the number of Microsoft 365 subscriptions records isn't accurate, verify that the *SAM - Import M365 User Subscriptions* scheduled job in the SAMP job log [samp_job_log] has completed successfully to pull the subscriptions.
     - Confirm that the existing integrations are working properly.
     - Determine if additional integrations are required for other Microsoft environments.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If the Microsoft 365 records appear accurately, verify the values in the **Display name**, **User principal name**, **Software model**, and **Subscription identifier** fields.

  Note: Subscription identifiers uniquely identify SaaS applications. Each identifier is associated with a discovery map and a software model, which normalizes software installations to Microsoft 365 subscriptions from the cloud.

  - Check if the software model is resolved correctly as per the subscription product definition.
  - Check if the **User** field on the subscription records is resolved. If it is not resolved, check the email of the user, which must match with the user principal name. You can also match the user name from the user principal with the user_name on the sys_user record.
  - If subscription identifiers are incorrect or empty, manage and resolve the subscription identifiers. For more information, see Subscription identifiers for SaaS and SSO applications.

2. Validate installation and usage data from inventory tools.

Note:

Establish a validation scope, as a proxy for full inventory validation, with a sample set of devices known to have Microsoft 365 product installations. The sample size must be no larger than necessary to validate installation data from the integration. If there are multiple integrations, compile separate sample sets for each integration.

a. Navigate to the Software Installations [cmdb_sam_sw_install] table, which lists the Microsoft 365 installations.

Interface	Action
Core UI	In the application filter navigator, search and select **cmdb_sam_sw_install.list**.
Software Asset Workspace	**i.** Navigate to **Software Asset Workspace** > **License operations** > **Discovery** > **Discovery models**. **ii.** Select a discovery model name. **iii.** Select the **Software Installations** tab.

b. Locate the **Installed on** column field and filter to one or more devices that are part of the validation scope.

i. Filter the list further to see all the Microsoft 365 product installations for devices.

- If the number of Microsoft 365 records is lower than expected, do the following:
  - Confirm that the existing discovery or inventory tools are working properly.
  - Determine if additional inventory tool integrations are required.
- If the number of Microsoft 365 records is higher than expected, confirm that the existing discovery or inventory tools are working properly. If the inventory tool integrations are working properly, then the high number of records might indicate potential savings chances.

ii. Verify computer records for devices within the validation scope.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Select the hyper-linked device name in the **Installed on** column field.
2. Review the data values such as **Name**, **Assigned to**, and **Operating System**.
   - If the number of computer device records is lower than expected, do the following:
     - Confirm that the existing discovery or inventory tools are working properly.
     - Determine if additional inventory tool integrations are required for missing data.
   - If the number of computer device records is higher than expected, confirm that the existing discovery or inventory tools are working properly. If the inventory tool integrations are working properly, then the high number of records might indicate potential savings chances.

What to do next

Import Microsoft 365 subscription entitlements

Import Microsoft 365 subscription entitlements

Import Microsoft 365 subscription entitlements into the ServiceNow Software Asset Management application.

Before you begin

Role required: sam_admin or sam_user

Procedure

1. Gather as many Microsoft 365 subscription entitlements as possible.
2. Fill out the entitlement template and import into the ServiceNow Software Asset Management application.

   a. Open the **Import Software Entitlements** page.

Interface	Action
Core UI	i. Navigate to **All** > **Software Asset** > **Licensing** > **Import Entitlements**. ii. Select **Download Template File (.xlsx)**.
Software Asset Workspace	i. Navigate to **Software Asset Workspace** > **License operations**. ii. Select **Create entitlement**. iii. In the Create new entitlement dialog box, select **Import multiple entitlements** from an Excel file. iv. Select **Next**. v. In the Create New Entitlement Import page, select **Download template** to download a spreadsheet template (.xlsx).

   b. Open the import template and review the **Directions** tab.

   c. Populate the import template with data from your gathered entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information about the additional details on the import template, see ServiceNow SAM Entitlement Import User Guide.

d. Use the following values on the template for Microsoft 365 entitlements:

- **Metric group**: Microsoft
- **License metric**: User Subscription

3. After the template is populated with entitlement data, import the template to the Software Asset Management application.

a. Import the template to the Software Asset Management application.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **Licensing** > **Import Entitlements**.
Software Asset Workspace	**i.** Navigate to **Software Asset Workspace** > **License operations**. **ii.** Select **Create entitlement**. **iii.** In the Create new entitlement dialog box, select **Import multiple entitlements** from an Excel file. **iv.** Select **Next**.

b. Import the completed template through **Browse files** or drag it.

c. Verify the imported software rights and resolve the import errors, if any.

4. Review the imported entitlements.

a. Confirm that the software entitlements are linked to the correct software models.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **Licensing** > **Software Entitlements**.
Software Asset Workspace	Navigate to **Software Asset Workspace** > **License operations** > **Licensing** > **Software entitlements**.

b. Select the display name for a software entitlement record.

c. On the Software Entitlements form, select the preview icon ⓘ next to the **Software model** field.

d. Confirm that the discovery map and suite components match the values on the template for Microsoft 365 entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If the discovery map doesn't match, add or edit directly on the software model form and select **Update**.

> **Tip:** After the entitlements are imported, you might need additional subscriptions purchases during the true-up process with Microsoft. For more information, see. Creating reserve entitlements for Microsoft online services.

What to do next
Reconcile for compliance

Reconcile for compliance

Run reconciliation to determine a license compliance position.

Before you begin
Role required: sam_admin

Procedure

1. Run reconciliation for Microsoft 365.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **Reconciliation**.
Software Asset Workspace	Navigate to **Software Asset Workspace** > **Software asset overview**.

2. Select **Run Reconciliation**.
3. In the dialog box, select **Microsoft** in the **Publishers** field.
4. Select **Continue**.
5. Select **Run**.
   You're automatically navigated to the Reconciliation Results page.
6. Monitor the status and progress values to confirm completion.
   Refresh the Reconciliation Results page to view the updated values. If the **Assigned to** value is empty for computers with Microsoft 365 application installs, the reconciliation might not work. For information about validating installation and usage data, see Validate subscription, installation, and usage data.

What to do next
Identify savings opportunities

Identify savings opportunities

Identify savings opportunities and save money with the ServiceNow Software Asset Management application.

Before you begin
Role required: sam_admin

About this task
For enterprise subscriptions such as E1, E3, and E5, Microsoft may specify a commit level, which serves as a minimum or a floor to your license count, which means you can't reduce the enterprise subscription quantities below the commit level during the contract term. If your

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

existing Microsoft contract has a commit level, you can realize potential savings opportunities at the end of the contract term.

Procedure

1. Realize your saving opportunities from over-licensed amounts.

   a. Navigate to the Microsoft 365 data.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **Reconciliation** > **License Workbench**.
Software Asset Workspace	Navigate to **Software Asset Workspace** > **License usage**.

   b. Locate and select Microsoft 365.
   The license compliance data is populated for the Microsoft 365 subscription.
      i. Locate the Rights available value, which is calculated by `Rights used - Rights owned`.
      ii. Locate the Over-licensed amount, which is calculated by `Rights available * Software entitlement unit cost`. This amount presents the following potential savings opportunities:
         - If new Microsoft 365 subscriptions aren't needed, you can remove the over-licensed amount during the next in-contract true-up without breaching the commit level.
         - If the commit level prevents in-contract true-up, you can use the over-licensed amount to inform new contract negotiations, which would be a proactive cost saving approach.

2. Realize your saving opportunities from software subscriptions last activity dates.

   a. Navigate to the Software Subscriptions or User subscription page.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **Discovery** > **Software Subscriptions**.
Software Asset Workspace	i. Navigate to **License operations** > **User subscription** > **User subscription**. ii. Select a user display name.

   b. Add the **Last activity** field and filter the list to view desired subscriptions.

      Note: The Last activity date is pulled from the published Microsoft 365 integration profile and inventory tools. If a subscription is a suite product, the Last activity date is the latest activity information from any of its suite components. Validate Last activity dates with Microsoft cloud administrators as needed.

   c. Right-click the **Display name** column header and select **Bar Chart**.

   d. On the Create a report form, set **Group by** to **Last activity** and select **Run**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information, see Create a report.
The report visualization automatically updates to display filtered software subscriptions grouped by last activity in bar chart form.

e. Point to any bar in the chart to view additional details and select a bar to view the individual records that comprise it.
For more information about using reports, see Using reporting.

3. Find Software Asset Management optimization recommendations for Microsoft 365 based on subscription details, usage, and potential savings based on recommendation type.

For more information, see Publisher optimizations for Microsoft.

Result
Microsoft 365 subscriptions that haven't registered user activity in over a few months are the potential reclamation candidates.

What to do next
Here are a few follow-up actions:

- Review the **User principal name** for any former employees. If found, reclaim subscriptions.
- For subscriptions tied to active employees, navigate to the Software Installations (cmdb_sam_sw_install) table.
- Filter the Software Installations list for Microsoft 365 and add the **Last used** column. Create a report if wanted.
- Compare the Software installations report with the Software subscriptions report.

Microsoft 365 license optimization

Find Software Asset Management optimization recommendations for Microsoft 365 based on usage.

Microsoft 365 available subscription details
Enhanced visibility of user activity within **Microsoft 365** *subscriptions*

Report	Description
Microsoft 365 subscription details	Number of active, inactive, and unassigned user subscription details for Microsoft 365, Office 365, and Power BI products, which are grouped by software models. Select a data point to view more details about the user subscriptions for a software model. • Select the **Active subscriptions** bar to view the active user subscriptions, where the last activity date is equal to or less than 90 days. • Select the **Inactive subscriptions** bar to view the inactive subscriptions, where the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft 365 available subscription details

Enhanced visibility of user activity within **Microsoft 365** *subscriptions*

(continued)

Report	Description
	last activity date is empty or was before 90 days. • Select the **Unassigned subscriptions** bar to view the number of available rights or user subscriptions that are unassigned.

Microsoft 365 optimization recommendations for subscriptions based on usage

Report	Description
Microsoft 365 optimization recommendations	Number of licenses per month that can be downgraded or reclaimed based on recommended downgrade, double licensed, and consolidate candidates. This report displays data for the last 12 months. Select any bar to view more details and act on the recommended downgrade or dual license candidates for a given month. • Select a bar that is marked as **Downgrades from Office 365 E5 to E3** to view the list of candidates that can be downgraded from Office 365 E5 to Office 365 E3. Select a candidate from the list to downgrade the related license. • Select a bar that is marked as **Downgrades from Office 365 E3 to E1** to view the list of candidates that can be downgraded from Office 365 E3 to Office 365 E1. Select a candidate from the list to downgrade the associated license. • Select a bar that is marked as**Downgrades from Microsoft 365 E5 to E3** to view the list of candidates that can be downgraded from Microsoft 365 E5 to Microsoft 365 E3. • Select a bar that is marked as **Downgrades from Microsoft 365 E3 to F3** to view the list of candidates that can be downgraded from Microsoft 365 E3 to Microsoft 365 F3. • Select a bar that is marked as **Consolidate** to view the list of consolidated Microsoft 365 optimization candidates.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Potential savings based on recommendation type

Report	Description
Potential savings by optimizing licenses	Potential cost savings for licenses on your physical hosts and clusters that are based on recommended license optimizations. **Note:** This report is available only for Microsoft Windows Server licenses. Select the report to view details about the recommended license optimizations and associated cost savings for each host or cluster. License optimizations include the recommended license, recommended rights, and recommended spending. For more information on license optimization, see License optimization for Microsoft subscriptions.
Microsoft 365 potential savings by type	Potential monthly savings for Microsoft 365 and Office 365 licenses that are based on recommended downgrade, double license, and consolidate candidates. This report displays potential savings for the last 12 months. Select any bar to view more details about the recommended downgrade or dual license candidates for a given month. • Select a bar that is marked as **Downgrades** to view the list of candidates that can be downgraded to a previous version of Microsoft 365 and Office 365. • Select a bar that is marked as **Double Licensed Users** to view the list of candidates with both Microsoft 365 and its applications (Office 365, Enterprise Mobility +Security (EMS), Windows) subscriptions. • Select a bar that is marked as **Consolidate** to view the list of Microsoft 365 consolidate subscriptions reclamation candidates.
Microsoft 365 portal available subscription details	Number of licenses that are available on the Microsoft portal per subscription. Select a bar to view details about the purchased subscription details, such as software model, product, purchased rights, assigned rights, available rights, and subscription profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

IBM ILMT setup success guide

This success guide provides information on the IBM License Metric Tool (ILMT) or IBM BigFix Inventory integration with the Software Asset Management application.

This integration supports license compliance for IBM products using the following IBM license metrics:

- Processor Value Unit (PVU)
- Resource Value Unit (RVU MAPC)

The integration imports only the IBM product usage data that is required for these license metrics.

Note: This integration doesn't import any discovery or usage data for IBM products that are licensed via other metrics.

For IBM license compliance to work with this integration, you must complete the following prerequisites:

- Set up and run ILMT or BigFix Inventory on your instance.
- Configure IBM ILMT agents to scan your instance in compliance with the IBM usage measurement guidelines.
- Enable ILMT or BigFix Inventory to discover the configurations of both virtual machines (VMs) and physical hosts as well as the relationships between them.
- Classify IBM components into IBM products through ILMT or BigFix Inventory.
- Bundle IBM components into IBM products through ILMT or BigFix Inventory.
- Install ILMT version 9.2.7 or later.

Complete the following steps for the IBM License Metric Tool (ILMT) and BigFix Inventory integrations with the Software Asset Management application:

1. Create a connection to ILMT or BigFix Inventory
2. Validate your ILMT connection health

Alternative to ILMT or BigFix Inventory

You can track and manage IBM licenses in both VMware vSphere environments and IBM LPAR infrastructures by integrating the Software Asset Management publisher pack for IBM with Software Asset Management providers that are authorized to participate in the IBM Client Value Acceleration (CVA) Program. With these integrations, you can track and manage IBM licensing directly without having to integrate with the IBM License Metric Tool (ILMT) or BigFix Inventory. For more information, see Client Value Acceleration (CVA) integrations for IBM.

Additional resources

- IBM license management by the Software Asset Management application
  - Software Asset Management publisher pack for IBM
  - Supported IBM license types
- Fix invalid computer serial numbers

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View all maturity items for Software Asset Management

View the maturity of your Software Asset Management (SAM) program to analyze the status of each maturity stage, where each stage shows the number of maturity items completed.

Before you begin

Role required: sam_admin, sam_user

Note: The sam_user can only view the maturity items. The sam_admin can view and change the state and success goal of the maturity item.

About this task

The maturity of your SAM program is divided into three stages:

- Crawl
- Walk
- Run

For more information, see Maturity stages of your Software Asset Management program.

Note: The maturity level can't be modified for a required maturity item.

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success portal**.
2. On the Overview page, select **View all maturity items**.
   The All maturity items page opens, which lists all the maturity items included in the stage your SAM program is in.
3. Select a maturity item to view its details.
   For a description of the field values, see Maturity item details.
4. If you want to create a Value builder task for the maturity item, select the **Value builder tasks** tab.
   For more information about creating a Value builder task, see Create a Value builder task.
5. Select **Save**.

Create success goals for Software Asset Management

Create success goals to track the success of the Software Asset Management application in your instance.

Before you begin

Role required: sam_admin

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success Portal**.
2. Select **Create success goal**.
3. On the form, fill in the details.
   For a description of the field values, see SAM Success Goal Details.
4. Select **Save**.
   The success goal appears in the License operations view under the Success goals list. You can cancel or delete a success goal from the License operations view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

- Create success activities for Software Asset Management
- Create a success goal category for software assets
- Success portal view in Software Asset Workspace

Create success activities for Software Asset Management

Create success activities to track the success of your goals.

Before you begin
Role required: sam_admin and sam_user

Procedure

1. Navigate to **Software Asset Workspace** > **Success Portal**.
2. Select **Create success activity**.
3. On the form, fill in the fields.
   For a description of the field values, see SAM Success Activity.
4. Select **Save**.

Result
The success activity appears in the License operation view under the Success activities list.

Related topics

- Create success goals for Software Asset Management
- License operations view

Create a success goal category for software assets

Create a success goal category for adding the category to the Software Asset Management success goal.

Before you begin
Role required: sam_admin

Procedure

1. Navigate to **Software Asset Workspace** > **License operations** > **Success goals** > **Categories**.
2. Select **New**.
3. On the Success Goal Category form, fill in the category that you want to add and select the **Software asset category** check box.

Result
The category that you add gets listed as an option in the **Category** field while creating a success goal for Software Asset Management. For more information, see Create success goals for Software Asset Management.

Renewals calendar view

Use the Renewals calendar in the Software Asset Workspace to view the entitlements nearing their expiry date and contracts nearing their expiry date or are already expired.

The sam_user and sam_admin roles can gain an understanding of the upcoming contract and entitlement renewals and expired contracts by navigating to **Software Asset Workspace** > **Renewals calendar**.

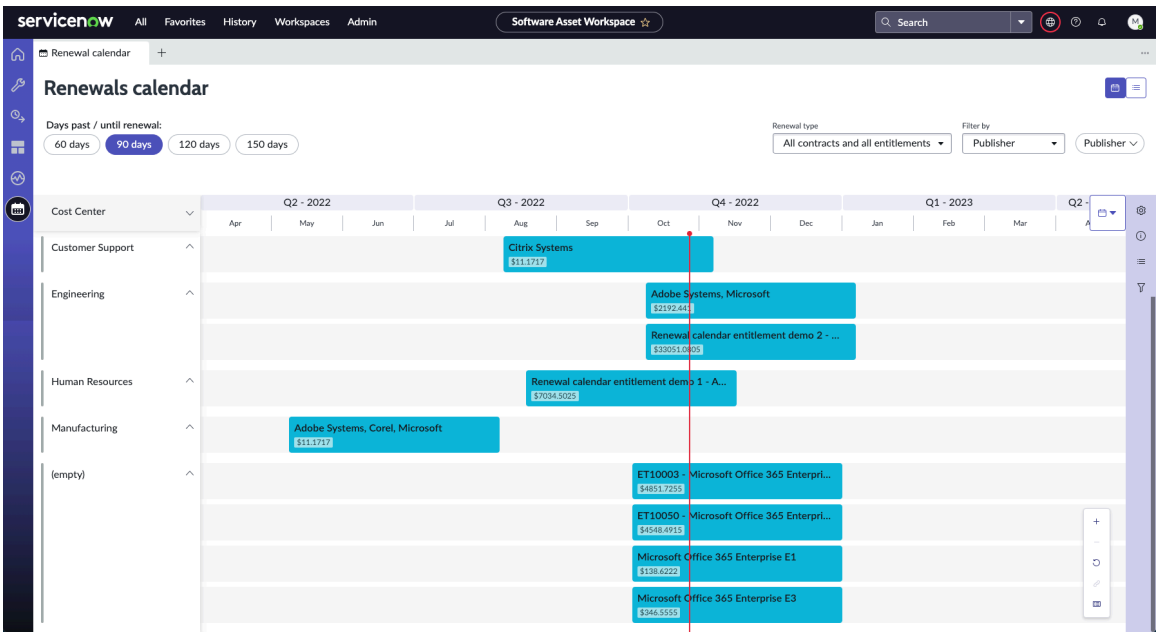
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Activate the Software Asset Workspace (sn_sam_workspace) store application to view the Renewals calendar.

This view shows upcoming and expired renewals with the following conditions:

- The contract must be active.
- Contracts expiring in 90 days or fewer.
- The end date of the contract must not be empty.
- The state of the contract is active or expired.
- The substate of the contract is either Awaiting review or Renewal rejected.
- Contracts with contract model types such as Subscription, Software License, and Maintenance.
- Entitlements with only license types of Perpetual or Subscription.
- Entitlements without any associated contract.

Renewals calendar view



The Renewals calendar lets you view:

- Calendar and list view of contracts and entitlements
- Details of contracts and entitlements in the calendar view

  You can switch to the list view from the top-most right corner of the Renewals calendar page.

  - Contracts
    - Contract name
    - Renewal start date for contracts nearing their end date
    - Renewal start date for expired contracts
    - Contract end date
    - Total cost
  - Entitlements

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Entitlement name
- Start date
- End date

  Note: The end date for perpetual entitlements is the maintenance expiration date.

- Total cost

Note: The calendar view shows the Renewal start date, which is calculated by

```
End date - Days past/until renewal
```

. Select the Days past/until renewal value such as 60, 90, 120, or 150 days. You must open the contract and entitlement record to view the actual start date.

- Number of upcoming contracts and entitlements renewals grouped based on the cost center in the left pane
- Contract information form on selecting the contract bar

  Note: You can renew, adjust, or cancel a contract from this record form.

- Entitlement information form on selecting the entitlement bar

  Note: You must create or associate a contract to proceed with the contract renewal workflow.

- A red line showing the current date. The contract or entitlement bar on the calendar view displays the start date as six months before the current date and the end date as six months after the current date.

You can filter and narrow down your results by:

- Upcoming renewals based on the time scale in the calendar view
- Days past or until renewal such as for 60, 90, 120, or 150 days
- Renewal types such as All contracts, All entitlements, and All contracts and all entitlements
- Publisher, Product, Contract model, and Cost Center subfilter based on the renewal type
- Domain

  Note: You must install the Domain Extension Installer [com.glide.domain.msp_extensions.installer] and Domain Support [com.snc.pa.domain_support] plugins to view the domain data on the Renewal calendar view.

Overlapping usage view

Use the Overlapping usage view in Software Asset Workspace to get insights into the feature level usage and rationalize your SaaS and Single sign-on (SSO) applications.

The Overlapping usage view displays reports showing the spend on your applications based on application category - SaaS or spend detection. You can also view the list of applications grouped by categories based on the main function of the software application, such as video conferencing, project management, and email marketing. This list of applications includes the following details:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Spend
- Usage
- Total number of subscriptions
- Reclamation candidates

Access the Overlapping usage view by navigating to **Workspaces** > *Software Asset Workspace* > **Overlapping usage**.

Note: Request the Software Asset Management - SaaS License Management Integrations application from the ServiceNow Store to view the Overlapping usage view.

Note: The Overlapping usage dashboard supports domain separation when Domain Extension Installer (com.glide.domain.msp_extensions.installer) and Domain Support (com.snc.pa.domain_support) plugins are activated. To filter the data, select a domain from the Domain drop-down list.

End users and roles

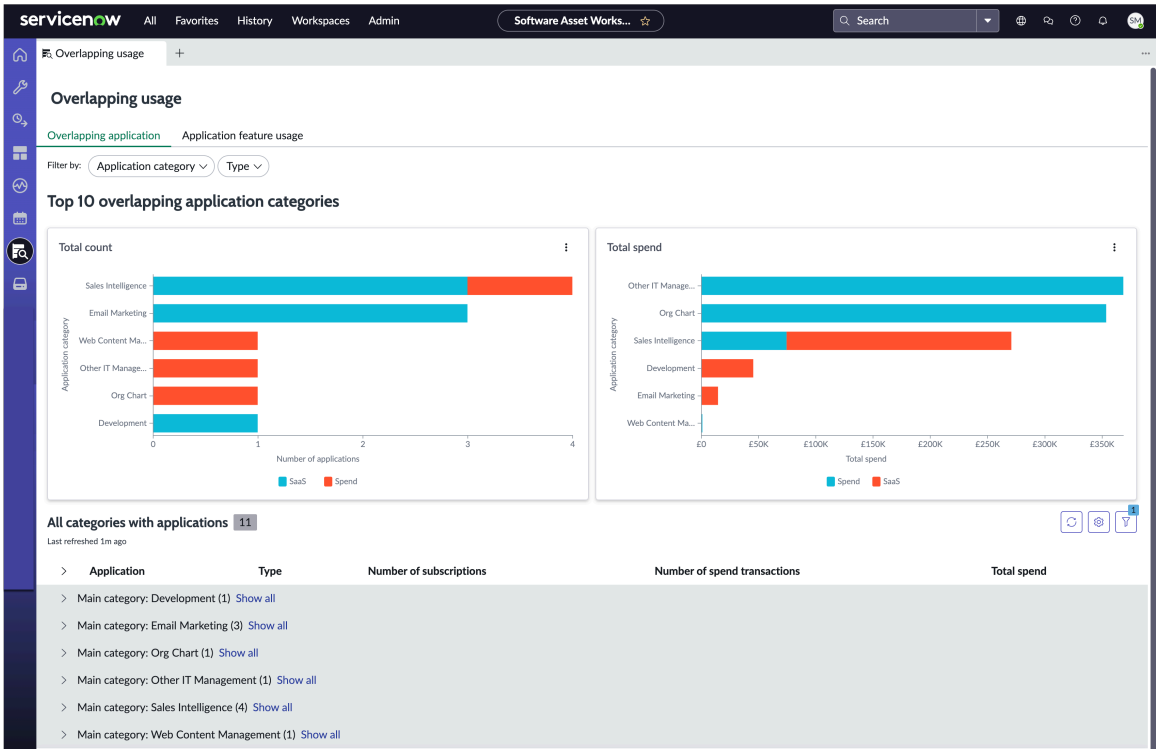
End user	Required role	Goal
SAM Admin/SAM User	sam_admin/sam_user	View the Overlapping usage dashboard. **Note:** A SAM Admin or a SAM user must have the it_demand_user role to create demand. You can create a demand from the Application feature usage page.

Overlapping applications

By selecting the **Overlapping applications** tab, you can view the following information:

- **Total count**: Total number of overlapping software applications grouped by application category, such as spend detection or SaaS. Selecting any application category bar navigates you to the list of applications of that type with details on their relevant number of subscriptions, total spend, and overall usage.
- **Total spend**: Total spend on overlapping software applications grouped by application category, such as spend detection or SaaS. Selecting any application category bar navigates you to the list of applications of that type with details on their relevant number of subscriptions, total spend, and overall usage.
- **All categories with applications**: The list of overlapping software applications grouped by category based on the main function of the software application. The number next to each category indicates the number of applications in that category, such as development and email marketing.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Application feature usage

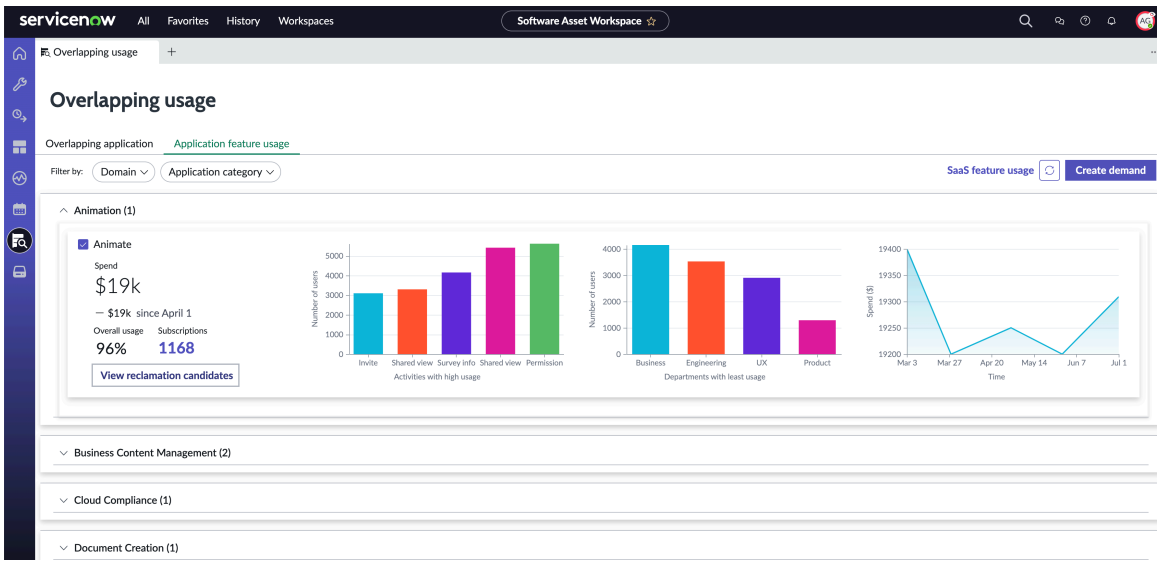
By selecting the **Application feature usage** tab, you can view the following information:

- A list view of the application categories.
- Detailed and descriptive feature usage information of an application. By expanding an application category, you can view the following data for each application within that category.

Attribute/Chart	Description
Spend	Total spend for the application.
Overall usage	The percentage of users who have performed at least one event in the application.
Subscriptions	Total number of subscriptions for the application.
View reclamation candidates	List of reclamation candidates for the application that aren't closed.
Activities with high usage	Top five activities with the highest usage based on the number of users.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute/Chart	Description
	Note: ○ This chart gets replaced by **Users with last login activity** for SSO applications and the SaaS applications for which only the last login activity is pulled. ○ This chart displays data for all events that have normalized mappings available in the SaaS Event Mapping (samp_saas_event_mapping) table.
Departments with least usage	Five departments with least usage for the application in your organization. The usage is based on the number of users. This data helps IT administrators to determine if users within these departments need access and alternatively to help drive adoption for those users. **Note:** This chart displays data only for users who are assigned to a specific department.
Spend trend chart	Graphical representation of monthly spending trends on the application.

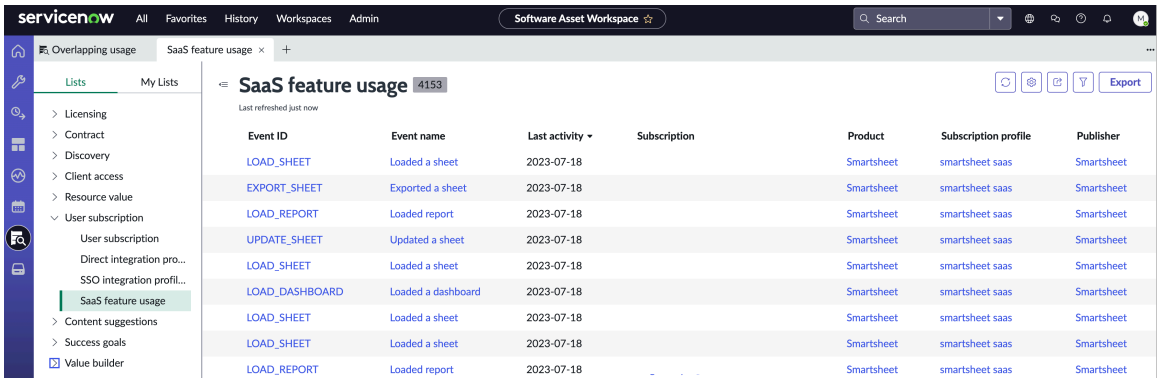


SaaS feature usage

The SaaS feature usage page includes the event details for each integration, such as the event ID, event name, last activity, subscription, product, subscription profile, and publisher. Navigate to the SaaS feature usage page in the License operations view by selecting the **SaaS feature usage** link.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The SaaS feature usage page displays event details for up to one year from the current date.



Creating demand to rationalize software applications

Creating demands enables you to take meaningful action against any redundant software you discover. You can discontinue software, reduce software usage, migrate users to approved software, or take other actions.

Note: The PPM Standard plugin (com.snc.financial_planning_pmo) must be installed to create demands.

Select **Create demand** to rationalize software applications. For more information, see Create demand to rationalize software applications.

Content lookup portal for Software Asset Management

The Content lookup portal gives you visibility into the data stored in the Content Library as part of the IT Asset Management Content Service via an intuitive user interface.

The Content Library is a repository of software product names and all additional information such as software product lifecycle dates, discovery maps, and publisher part numbers (PPNs). This information is stored in different tables in the Content Library. For more details on the Content Service, see Software Asset Management Content Service.

The Content library portal application is available in the ServiceNow Store. After you install the application, verify that the AI Search (com.glide.ais) plugin is activated. For details on installing the Content library portal application, see Install Content library portal for Software Asset Management.

The Content lookup portal enables you to do the following:

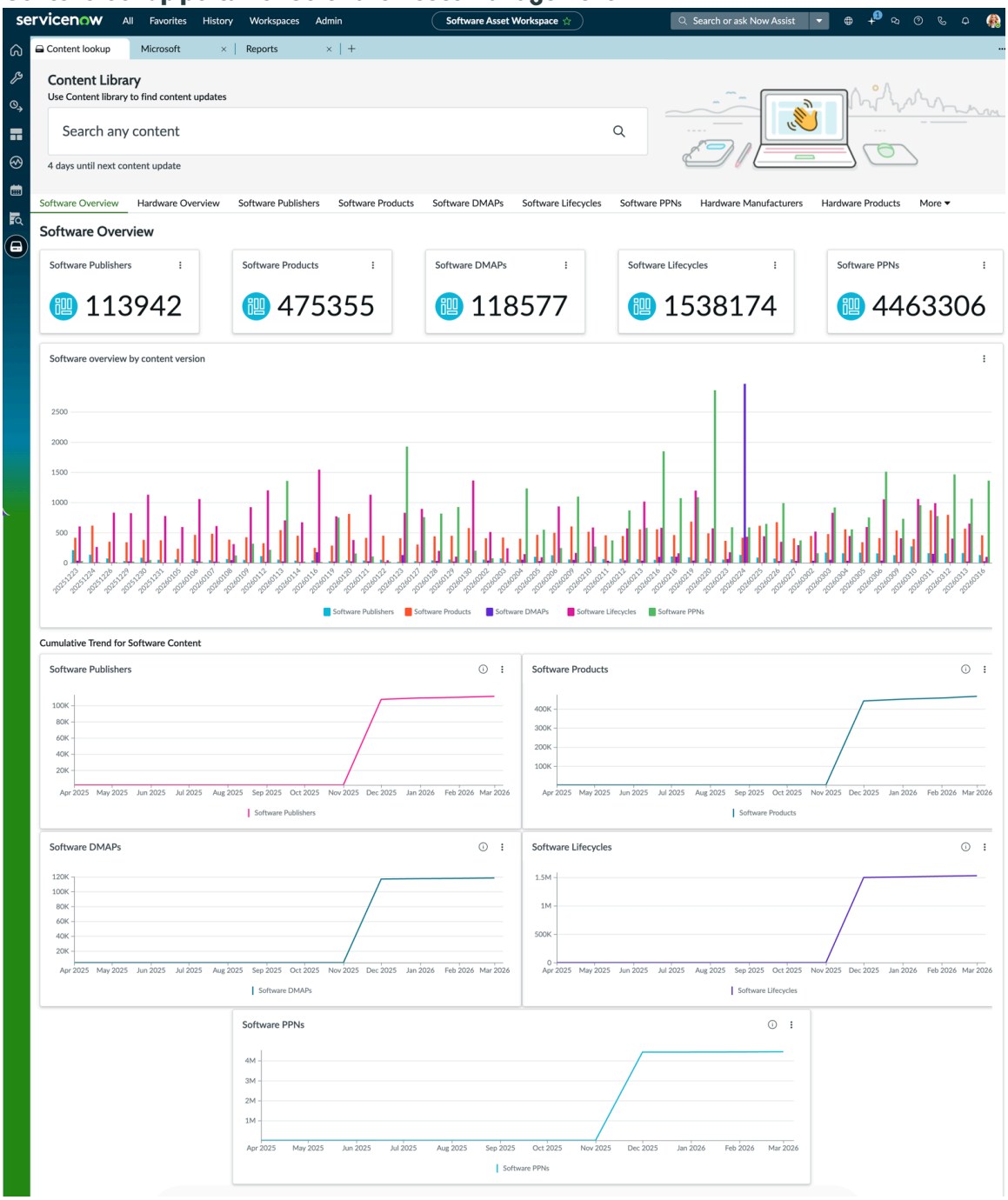
- Search for a specific software publisher, product, Discovery Map, life cycle, and PPN.
- View the entire list of software publishers, products, lifecycles, PPNs, and Discovery Maps in the Content Service.
- View additional details related to software products such as software version, and software product life cycles.
- View the days remaining for the next content update.

Access the Content lookup portal by navigating to *`Software Asset Workspace`* > **Content lookup**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: After installing the Content library portal application, when you access Content lookup portal for the first time, the charts aren't populated on the page due to the absence of historical data. To load the charts, execute the Historical Data Collection jobs. For details, see the Historical Data Collection job article in the Now Support Knowledge Base.

Content lookup portal for Software Asset Management



On the Content lookup portal, you can view the information based on the applications that are installed.

- If only the Software Asset Management Professional application is installed and you have the sam_user role, you can view the following tabs showing the data stored in the Software Asset Management Content Service:
  - Software Overview
  - Software Publishers

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Software Products
- Software DMAPs
- Software Lifecycles
- Software PPNs

- If both Software Asset Management Professional and Hardware Asset Management applications are installed and you have both sam_user and asset roles, you can view both software and hardware content tabs. For more information about the Hardware Asset Management Content lookup portal, see the Content lookup portal for Hardware Asset Management.

The Content lookup portal uses the AI search functionality and helps you to search for a specific software publisher, product, Discovery Maps, life cycles, and PPNs.

After you enter your search criteria in the search bar, the search results are listed with the most relevant matches at the top. Using the Filters section, you narrow down the result further.

Based on your search criteria, the information in the Content Service is pulled from multiple tables, such as:

- Software Products [samp_sw_product]
- Discovery Maps [samp_sw_entitlement_definition]
- Software Product Definitions [samp_sw_product_definition]
- Software Publishers [samp_sw_publisher]
- Software Product Lifecycles [sam_sw_product_lifecycle]

Select the search result that matches your criteria to display the details page along with the related lists. The details page opens in read-only mode. For example, if you select the Microsoft SQL Server 2008 Enterprise product result, the Microsoft SQL Server 2008 Enterprise page appears with the related lists such as software version, software life cycle data, and PPN.

Software Overview tab

The **Software Overview** tab is by default displayed when you navigate to the Content library portal. View the following software widgets on this page.

Software metrics

Report	Source	Description
Software Publishers	Software Publishers [samp_sw_publisher]	Total number of software publishers stored in the Content Library. Select the number of publishers to view the list of Software publishers. By default, all active records are populated on the list.
Software Products	Software Products [samp_sw_product]	Total number of software products stored in the Content Library.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software metrics (continued)

Report	Source	Description
		Select the number of products to view the list of Software products. By default, all active records are populated on the list.
Software DMAPs	Discovery Maps [samp_sw_entitlement_definition]	Total number of software discovery maps stored in the Content Library. Select the number of DMAPs to view the list of Software DMAPs. By default, all active records are populated on the list.
Software Lifecycles	Software Product Lifecycles [sam_sw_product_lifecycle]	Total number of life cycle records of software products stored in the Content Library. Select the number of lifecycles to view the list of software product lifecycles. By default, all active records are populated on the list.
Software PPN	Software Product Definitions [samp_sw_product_definition]	Total number of the software publisher part numbers stored in the Content Library. Select the number of PPNs to view the list of Software PPNs. By default, all active records are populated on the list.
Software overview by content version	• Software Publishers [samp_sw_publisher] • Software Products [samp_sw_product] • Discovery Maps [samp_sw_entitlement_definition] • Software Product Lifecycles [sam_sw_product_lifecycle] • Software Product Definitions [samp_sw_product_definition]	Graphical representation of the count of the software content released across various content versions. The information is grouped by the content version. Select a specific bar on the chart to view the detailed list of the software content. You can view the software content released in that particular content version on the list page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software metrics (continued)

Report	Source	Description
Cumulative Trend for Software Content	• Software Publishers [samp_sw_publisher] • Software Products [samp_sw_product] • Discovery Maps [samp_sw_entitlement_definition] • Software Product Lifecycles [sam_sw_product_lifecycle] • Software Product Definitions [samp_sw_product_definition]	Graphical representation of cumulative trend of software content released every month. Cumulative trend chart for the following software content is displayed: • Software Publishers • Software Products • Software DMAPs • Software Lifecycles • Software PPNs Select a specific point on the trend line to view a detailed list of the software content. On the list page, you can view the cumulative software content released for that particular content until the 1st of that month. For example, you selected the July 2025 trend point on the Software Products chart. The Software Products list table displays software products released till 1st July 2025.

Software Publishers tab

View a list of software publishers released in the Content Library. On the Software publishers list, only active publishers are displayed with a default filter condition applied. Select the publisher's name to view the publisher's details.

Software Products tab

View a list of software products released in the Content Library. On the Software products list, only active products are displayed with a default filter condition applied. Select the product name to view the product details.

Software DMAPs tab

View a list of software discovery MAPs released in the Content Library. On the Software DMAPs list, only active DMAPs are displayed with a default filter condition applied. Select the DMAP number to view the details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Lifecycles tab

View a list of life cycle records of software products released in the Content Library. On the Software lifecycles list, only active lifecycles are displayed with a default filter condition applied. Select the version to view the software product lifecycle details.

Software PPNs tab

View a list of software publisher part numbers released in the Content Library. On the Software PPNs list, only active PPNs are displayed with a default filter condition applied. Select the publisher's part number to view the software part number details.

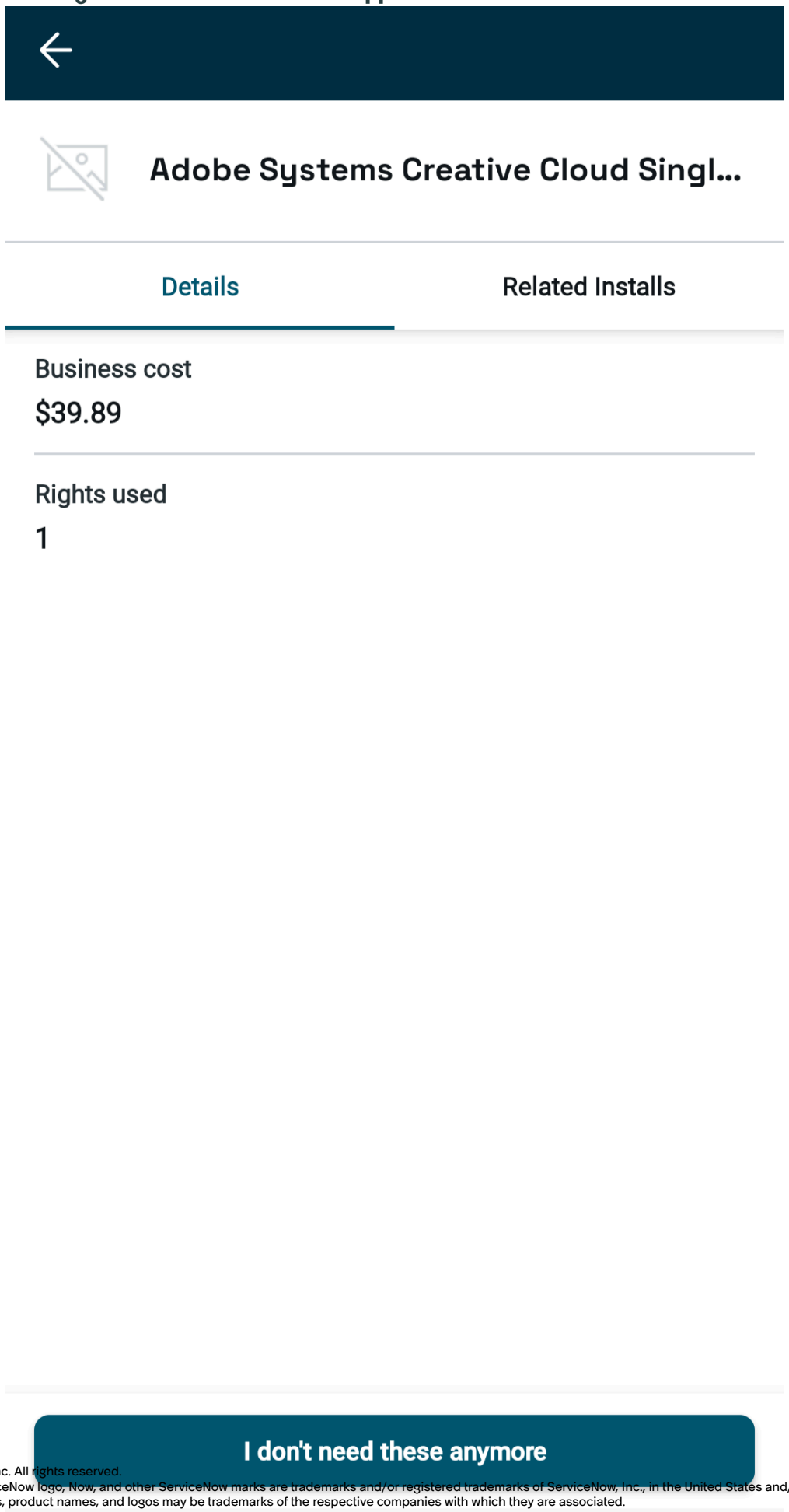
Now Mobile app for Software Asset Management

Use the Now Mobile app to view the hardware and software assets that are assigned to you.

In the Now Mobile app, you can view a list of both installed software and subscription software by navigating to **My Items** > **My Assets** > **Software**. You can find information on when you last used a piece of software. If some software is installed on more than one device, you can also view all the devices. The Now Mobile app gets the list of assets from the Software Subscription, Rights used by, and Rights needed by tables.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Viewing assets on the Now Mobile app



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tap any of your assets to view its details such as its business cost, its last activity, and other information. If you want to surrender the asset, tap **I don't need this anymore**. A removal candidate is generated so that the software asset manager can review and approve the removal request.

Virtual Agent for software requests

You can implement ServiceNow® Virtual Agent to enable your employees to request software through a predefined conversational interface that is powered by artificial intelligence. Virtual Agent helps address software requests automatically so that your IT fulfillment professionals can focus on more complex requests and incidents.

For information on how to implement and use Virtual Agent, see Virtual Agent.

Prerequisites

Before you can begin using Virtual Agent for your software requests, complete the following prerequisites:

- Activate the Software Asset Management Professional (com.snc.samp) plugin on your ServiceNow instance.

  See Request Software Asset Management for more information on how to activate this plugin.

- Activate the Glide Virtual Agent (com.glide.cs.chatbot) plugin on your ServiceNow instance.

  See Activate Virtual Agent for more information on how to activate this plugin.

- Request and install the ITSM Virtual Agent Conversations application from the ServiceNow Store.
- Request and install the ITSM NLU Model for Virtual Agent Conversations application from the ServiceNow Store.
- Enable automatic allocation of your software by setting the workflow of the corresponding software catalog items to **Procurement Process Flow - Auto allocation enabled**. See Create or edit a catalog item for more information on how to set the workflow for a software catalog item.

Software request flow on Virtual Agent

When a user requests software, Virtual Agent automatically recommends appropriate options based on the software that is available in your software catalog. Upon selecting an option, the user is prompted to specify the user or device that the software is being requested for. Virtual Agent then generates a request item and initiates one of the following workflows to allocate rights to the specified user or device:

- User allocation workflow: Allocates rights to the specified user. Virtual Agent initiates this workflow when the corresponding software entitlements support either user allocations only or both user and device allocations.
- Device allocation workflow: Allocates rights to the specified device. Virtual Agent initiates this workflow when the corresponding software entitlements support either device allocations only or both user and device allocations.

Note: Rights are allocated to the specified user or device in ascending chronological order of software entitlements, starting with the oldest software entitlement.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If a software entitlement supports both user and device allocations or your software contains both user allocation- and device allocation-based software entitlements, Virtual Agent initiates the user allocation workflow first. Virtual Agent initiates the device allocation workflow only after all user allocations are consumed.

If the corresponding software entitlements contain enough active rights and allocations to fulfill the request, Virtual Agent automatically approves the request and allocates rights to the specified user or device. The user is then provided with instructions to download and install the software.

If the corresponding software entitlements do not contain enough active rights and allocations to fulfill the request, you must source the required rights manually. After you source those rights, Virtual Agent automatically allocates them to the specified user or device. The user is then provided with instructions to download and install the software.

Important: Software can be requested and allocated using this same flow in the ServiceNow® Service Catalog and Employee Center. See Service Catalog for more information on the Service Catalog. See Employee Center for more information on the Employee Center.

Software Asset Management Content Service

Opt in to the Software Asset Management Content Service to share unnormalized software installation data from your organization with ServiceNow® to improve the normalization process.

The Software Asset Management Content Service is an IT Asset Management (ITAM) shared service that provides users with continual software recognition improvements. By sharing unnormalized software installation data with ServiceNow, you receive automatic content updates based on your unique software installation footprint. For more information on content updates, see Content updates for Software Asset Management.

The Software Asset Management Content Service transfers data between your organization and ServiceNow through a Content Data Service (CDS) instance. In commercial deployments, data is transferred through a CDS instance that is deployed in a commercial data center. In National Security Cloud (NSC) Department of Defense (DOD) Impact Level 5 (IL5) deployments, data is transferred through a CDS instance that is deployed in an NSC DOD IL5 data center.

Note: Data for your NSC DOD IL5 deployments can be transferred only from ServiceNow to your organization. It cannot be transferred from your organization to ServiceNow. Since you cannot share any unnormalized software installation data with ServiceNow, you must manually create a software content request for any software product that you want to add to the Software Asset Management Content Library. After the software product is added to the Content Library, the Software Asset Management application can begin normalizing the corresponding software installations that are discovered in your NSC DOD IL5 deployments. See Create IT Asset Management content request for instructions on how to create a software content request.

No personally identifiable information is shared with ServiceNow. However, please note the exception for custom software products, as described in the Software Asset Management Content Service asset data types table below.

Data that is shared using the Software Asset Management Content Service remains secure and is properly disposed of after review, following the same ServiceNow privacy policies, procedures, tools, and techniques that are used to secure ServiceNow instances. The selection of data types that are shared with ServiceNow is configurable by your organization. In addition, data is never packaged and shipped to other ServiceNow customers.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

This new content improves your normalization hit ratios, which enable you to manage your software assets better. By default, you aren't opted in to the Content Service. For information on how to opt-in, see Enable sharing information with Software Asset Management content service.

If you want to exclude any software discovery models, custom software products, or custom publisher part numbers from being shared with ServiceNow, select the **Exclude from content service** check box on the Software Discovery Model, Custom Software Product, or Custom Part Number form.

The normalization process acts only on active publishers, products, and rules. Obsolete rules aren't used. You can deactivate any Normalization Library content version at any time.

Data sharing for Software Discovery Models, Software Model Lifecycles, Part Numbers and Discovery Maps, Processor Names, and Product License Exception Rules is automatically enabled after opting in. If you don't want to share a type of asset data, select the toggle button next to the type of data on the Content Service Setup page and then select **Save**.

Software Asset Management Content Service asset data types

Software asset data	Definition	Details transferred
Software Discovery Models	Model created to classify and reduce duplication of software installs when new installs are identified. Only Software Discovery Models with the following statuses are transferred: • Match not found • Publisher normalized • Partially normalized • Manually normalized • Normalized **Note:** Only the Discovery models whose status is Normalized and Version is empty are transferred. **Note:** To improve the accuracy of machine learning predictions, software discovery models normalized by machine learning are transferred.	• Discovered publisher • Discovered product • Discovered version • Normalized publisher • Normalized product • Normalized version • Edition • Language • Platform • Rule table • Rule ID • ML model version • ML normalization status • ML prediction values **Note:** You can override the ML model used for prediction by specifying alternate values in the property `com.snc.samp.ml.overrride_ml_` The admin and sam_admin have read access to this property but only the admin has both read and write access.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Content Service asset data types (continued)

Software asset data	Definition	Details transferred
Software Product Lifecycles	The externally defined or publisher-defined life cycle of the software product. Only software product life cycles that aren't created by ServiceNow and have a life-cycle type that is not internal are transferred.	• Publisher • Product • Licensable version • Edition • Full version • Lifecycle phase • Phase start date • Lifecycle source
Part Numbers and Discovery Maps	Custom part numbers and custom discovery maps that are manually created to represent the publisher part number and the corresponding version and edition of the software product.	• Publisher part number • License type • Publisher • Product • Discovery map • Version condition • Version • Edition condition • Edition • Platform • Platform condition • Language • Language condition • Database Option
Processor Names	Processor identified on a configuration item (CI). Only processors mapped to the default processor factor are transferred.	• CPU type • Core count • Speed
File signatures	Signature that identifies software packages discovered on CIs. Software packages are discovered based on the attributes of the file, such as file name or file size. Only file signatures that are manually normalized are transferred.	• File name • File size • Publisher • Product • Version • Edition

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Content Service asset data types (continued)

Software asset data	Definition	Details transferred
		• Platform • Language
Software Spend Transactions **Note:** Displays only if Software Spend Detection is installed. Data sharing for Software Spend Transactions is inactive by default.	Software Spend Transaction records that were imported for Software Spend Detection. Only the vendor name, transaction description, general ledger account, and prediction results are transferred.	• Vendor name • Description • GL account • Is software • Publisher ID • Product ID
Unrecognized Subscription Identifier	Subscription identifiers that software models aren't associated with in the ServiceNow content.	• Subscription identifier • Software model • Number of subscriptions
Common Platform Enumeration (CPE) normalization rule	Publisher, product, version, and edition, as well as their corresponding values of the software product in the Software Asset Management Content Library.	• Publisher • Product • Version • Full Version • Edition • Language
Product License Exception Rules	Product, edition condition, edition, and product type, as well as their corresponding values of the software product in the Software Asset Management Content Library. The exception rules table provides an option to tag	• Product • Edition condition • Edition • Product type • Active

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Content Service asset data types (continued)

Software asset data	Definition	Details transferred
	certain product editions as non-licensable. **Note:** If a product is labeled as non-licensable, and you want to tag an edition of that product as licensable, then you should submit a request with the Content Service team.	**Note:** This record enables you to add your own exception rules using the Custom Product License Exception Rules [samp_custom_lic_exception_rules] table. This table is available to you and has reverse push capabilities. This functionality enables you to create an exception rule for a case where the product is licensable but certain editions of the product are non-licensable.
Custom Software Products	Custom software products that were manually added to your ServiceNow instance. You can add a custom software product for any publicly-available software product that does not already exist in the Software Asset Management Content Library. See Add custom software products in workspace for detailed instructions.	• Publisher • Product • Product type • Product classification • Subscription software **Warning:** In addition to transferring these details, the Software Asset Management application transfers the instance name and customer name.
Extracted Entitlements from Software Contracts using Machine Learning	Software entitlement details are extracted from software contracts using machine learning. This helps in improving our machine learning model to predict product, publisher, and edition values. Additionally, it also enhances our mapping capabilities by adding more entries to the mapping table.	• Publisher part number • Product description • Publisher • Product • Version • Edition • Named user type • Database option • License type • License metric

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Content Service asset data types (continued)

Software asset data	Definition	Details transferred
		• Subscription period • Agreement type

You can opt in to Content Service from the Configuration Console for Software Asset Management. The Console provides an AI-guided setup to walk you through the process. For more details about the Configuration Console, see Configure Content Service setup using AI.

Opting out

You can opt out at any time from the Content Service Setup page.

When you opt out, your company no longer contributes to the improvement of the normalization process. You still receive content updates, but the updates may be less applicable because they aren't informed by your company's unique software installation footprint that exists within your environment and CMDB.

Your company can rejoin the Software Asset Management Content Service at any time.

Related topics

- Normalization and Content Service dashboard
- Enable sharing information with Software Asset Management content service
- Configuration Console for Software Asset Management
- Configuration Console overview
- Configure Software Asset Management using the Configuration Console

Content updates for Software Asset Management

The Software Asset Management Content Service provides content updates to your instance twice every week that you can use to normalize your data.

The following types of content can be updated as part of a content update:

- Categories
- Discovery maps
- Normalization suggestions
- Product classifications
- Product license exception rules
- Product names
- Product types
- Publishers
- Suite definitions
- Software model life cycles
- Software model suggestions
- Custom software product suggestions
- Common Platform Enumeration (CPE) normalization rule

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Software models aren't updated when a publisher's name is updated as part of the content updates. The software model isn't updated because its display name is removed from the core company's reference. However, if a product moves to a different publisher, then the software model gets updated during content updates when the product goes from one core company to the other core company. The publisher name is updated for new software models but not for existing software models.

Product types can be updated on a product's edition level using the Custom Product License Exception Rules [samp_cust_prod_lic_excep_rules] table. For cases where certain editions are non-licensable, the product type gets updated automatically if the exception rule is defined in the Product License Exception Rules [samp_prod_lic_excep_rules] table or the Custom Product License Exception Rules [samp_cust_prod_lic_excep_rules] table. However, if a product is non-licensable, an exception rule can't be created for a licensable edition. For this case, you must raise a case with the Content Service team with supporting documentation and the team reviews whether the edition must be tagged as licensable.

The *SAM - Apply latest content changes* scheduled job runs and processes the content updates. After the content download is complete, the updated content is pulled from the staging columns to the corresponding target columns. Related downstream records are also updated.

A query runs and identifies what transactional data in your instance must be updated with the new content. After the changes are identified, the changes are then propagated to your instance.

Another scheduled job, *SAM - Create suites for a software model*, runs and propagates suite component and life cycle changes to your software models. If you don't want content changes applied to a software model, then you can clear the **Allow automated content updates** flag on the Software Model form. By default, the flag is selected to enable automated content updates to all software models.

Note: If a content update adds life-cycle data, it can't be deleted from the software model, but you can deactivate it. Any life-cycle data that is added as part of a content update has the source set to *Servicenow*.

Use the Software Models with deactivated discovery maps report to show software models that are pointing to any deactivated discovery maps.

To see the changes that have been made to the software library, review the SAM Content Audit [sam_content_audit] table.

Note: Content updates don't have an impact on any custom products or custom discovery maps.

For more information on how to send your content to ServiceNow, see Enable sharing information with Software Asset Management content service.

Software models and software entitlements

A software model is a profile of the software that you have purchased, including information about the publisher, version, and discovery map. Software entitlements are used to relate the software model to the rights that you have purchased.

Software models

Software models are used to record publisher information and create a profile. You can link multiple entitlements to one software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you delete a software model, all records related to the software model, in the Downgrade Rights [samp_sw_downgrade_model and samp_downgrade_model] tables, are automatically deleted. For detailed information on downgrade rights, see Downgrade Rights.

For details on manually creating software models, see Create a software model in the Software Asset Workspace. For details on automatic creation of software models, see Automatic creation of software models.

Software entitlements

To track the software rights for your software, create a software entitlement that can be linked back to the publisher information.

A software entitlement records the terms of your software license. By using software entitlements, you can:

- Rapidly address if license allotment has been exceeded and return to compliant status by removing unauthorized software or ordering more licenses.
- If the license allotment is not being used completely, lower the number of future licenses purchased.

For example, a company purchases a software entitlement for 100 rights. From the software entitlement, 100 employee or machine allocations are created that are rightfully assigned a license. If Discovery finds the software installed on 200 machines, the software asset manager must identify the employees or machines that have the software installed without a license, and remediate the situation.

For details on creating software entitlements, see Create entitlements in workspace.

Import software entitlements

Import bulk software entitlements at one go.

If a Publisher Part Number (PPN) is specified for the entitlements that you import, the PPN is matched to PPN in the Content Service Library and the data is used to create a software model automatically.

Note: If a `Publisher Part Number not found` error occurs during import of the software entitlement (product, publisher, version, edition, platform, and language), open the record and correct the error. To generate a custom part number, select **Create PPN**. If a discovery map is not found, you can create a discovery map to be associated with the publisher part number.

If the import spreadsheet contains a conflicting (or missing) PPN, the PPN value is set to the value in the existing product definition, when available.

Note: If you import a batch of Microsoft entitlements and the **License Duration** field is set to **Contractual**, you must specify the start and end date.

The step-up license type is only available if the publisher is Microsoft. If you try to specify another publisher, an error message is displayed.

PPN and software model resolution in entitlement imports

The system uses different resolution strategies depending on:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Whether a PPN is provided in the import row.
- Whether the import is standard (custom) or MLS (Multi-License Service).
- Whether the automatic software model creation property is enabled.

Scenario 1: PPN field is blank

For standard (custom) imports, the system attempts to identify a software model through a matching process:

1. The system tries to identify a software model using the **Publisher**, **Product**, **Version**, **Edition**, **Platform**, and **Language** fields provided in the import row.
2. If an exact match is found, the software model is assigned, and the import proceeds normally.
3. If no exact match is found, the system tries a relaxed search, allowing any platform or any language, to find the closest match.
4. If a match is found through the relaxed search, the software model is assigned and there is no error.
5. If no match is found:
   - If the automatic software model creation property is enabled (the default), and both publisher and product are identified, the system automatically creates a new software model and the import proceeds.
   - If the automatic software model creation property is disabled, or publisher or product can't be identified, an error record is created: `PPN and SM not found`.

For MLS imports, the system doesn't attempt to find a software model from other fields when the PPN is blank. The import row continues to other validation checks but will likely fail at downstream validations (such as license metric resolution) that depend on PPN or software model.

Scenario 2: PPN is provided

PPN exists in the Content Library:

1. The system looks up the associated software model.
2. If exactly one software model is found, it is assigned and there is no error.
3. If multiple software models are found, an error record is created: `Multiple software models found for the Publisher Part Number. Please choose a software model`.

PPN doesn't exist in the Content Library or is marked Inactive:

1. The system searches for a software model using **Publisher**, **Product**,**Version**, **Edition**, **Platform**, and **Language** (exact match only; no relaxed search in this scenario).
2. If software model is found:
   - The PPN not found issue is noted internally.
   - If no other validation errors exist on the row, the entitlement is created without a PPN reference.
   - If other validation errors exist, such as invalid license type, missing purchased rights, an error record is created including `Publisher Part Number not found` alongside other errors.
3. If software model isn't found:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If automatic software model creation is enabled, the import is standard (custom), and both publisher and product can be identified, the system automatically creates a software model.
- Else, an error record is created: PPN `and SM not found`.

Automatic creation of software models

Software models are automatically created for software installations if one doesn't already exist.

All software installations need to be associated to software models. Being associated to a software model, helps in remediation and ensures that the software installations are included during cost estimation in order to be compliant.

If a software installation doesn't correspond to any software model, the system automatically creates a software model.

- To create a software model automatically for licensable products, enable the property *`com.snc.samp.automaticsmrcreation`*.
- To create a software model for not licensable products, enable the property *`com.snc.samp.automaticsmcreation`*.
- To create a software model result for unlicensed products during software asset reconciliation, enable the property *`com.snc.samp.unlicensed_smr_creation`*.

Note: You can update the above mentioned properties by navigating to **Software Asset** > **Administration** > **Properties**.

When reconciliation runs, the system searches if any software model exists for the software installation. The search for an existing software model is based on attributes such as version, edition, language, platform, and install condition. If all conditions for the attributes in an existing software model match, then a software model is not created hence avoiding the creation of duplicate software models.

A software model is only created if no match is found. The software model is created across versions and for the specific edition, if available. However a software model is never created against a specific version.

Discovery maps are associated to software models only if a discovery map exists for that software model. If a corresponding discovery map doesn't exist in the Content Service library, a software model still gets created without a discovery map.

You can identify whether a software model or software model result is created automatically by checking which property is used: *`com.snc.samp.automaticsmrcreation`*, *`com.snc.samp.automaticsmcreation`*, or *`com.snc.samp.unlicensed_smr_creation`*. In the Software Model list view, select the gear icon to display the *`Created source`* column. If the value in this property says `System property`, then it indicates that the software model was automatically created by one of the properties. After you enable the properties, wait for the scheduled reconciliation to run, or trigger it manually, to see the results.

Related topics

Software Asset Management properties

Custom publisher part numbers (PPN)

Propagate changes to entitlements and software models by replacing your custom PPNs and custom discovery maps (DMAPs) with the Software Asset Management Content Service PPNs and DMAPs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

A custom PPN can only be replaced if its part number maps to a genuine publisher SKU in the normalized product catalog. Replacement works by matching the part number against the publisher's authoritative content library. The engine then swaps the custom entry for the standardized product record. If the part number isn't a valid SKU, nothing in the catalog matches it. The normalization engine can't validate or replace it, so it remains a manually-maintained custom entry that you must manage yourself. For information on custom part numbers, see Custom publisher part numbers (PPN) and Add a custom part number.

Once the Content Service updates are downloaded to your instance, the scheduled job, *SAM - Find Product Definition Suggestions*, runs. The scheduled job checks all custom PPN and DMAP records to find corresponding PPN and DMAP matches on the Content Service. If a match for the custom PPN and DMAP is found, then a suggestion record is created in the Part number suggestions [samp_sw_part_number_suggestion] table. You can view the suggestions record by navigating to the **Part number suggestions** option.

Note: If you have excluded custom PPNs from the Content Service by selecting the **Exclude from content service** option in the Custom Part Number form, then suggestions aren't shown for those custom PPNs.

Note: For details on viewing the suggestion records, see View publisher part number (PPN) suggestions in workspace or View publisher part number (PPN) suggestions in Software Asset Management classic.

You can accept or reject the suggestions. If you accept the suggestion, the custom PPN and DMAP are replaced with the Content Service PPN and DMAP. All changes to entitlements and software models are propagated automatically.

The propagation of the content service PPN results in the following changes:

- All impacted entitlements are updated with the new PPN.
- Downgrade rights associated with the content service DMAP gets copied to the entitlement.
- Downgrade rights that are copied overwrite any existing entries made by you.
- Values for license type and license metric get modified based on the PPN (where needed).
- Entitlement remains in the **In use**state.

The propagation of the Content Service DMAP results in the following changes:

- Associated software model is updated with the new DMAP.
- Fields get impacted on the software model:
  - Short description, Asset tracking strategy/unit, next version.
  - Suite components/parents get overwritten with the Content Service DMAP values.
  - Any custom components that were added are deleted, as stated in a warning.
  - Life cycles get overwritten (with a warning message).

Software Asset Management migration

Migrate from the Software Asset Management plugin (ITSM Software Asset Management feature of Asset Management) to the Software Asset Management application to take advantage of more powerful features. Manual actions by the customer are required after plugin activation.

After automatic changes are performed during plugin activation, successful migration from the Software Asset Management (com.snc.software_asset_management) plugin to the Software

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Professional (com.snc.samp) plugin requires a manual procedure to be performed by the customer.

Customizations to forms and lists may need to be manually overwritten by the customer after plugin activation. In addition, certain fields in software models, software entitlements, user/device allocations forms require manual configuration by the customer after plugin activation.

Automatic changes

The Software Asset Management Professional (com.snc.samp) plugin performs these automatic changes:

- Tables
  - Table labels renamed

Table	Original Label	New Label
[alm_license]	Software License	Software Entitlement
[alm_entitlement_user]	User Entitlement	User Allocations
[alm_entitlement_asset]	Device Entitlement	Device Allocations

  - Adds new tables and script includes.
  - Adds any string value in the Software Entitlements **License key** field to the License Key [samp_sw_license_key] table
- Field names and values
  - **Inference mandatory** field

    For software models that have suite components (to bundle software models), the **Inference mandatory** field value in the Software Suite [cmdb_m2m_suite_model] table is transferred to a new **Mandatory** field

  - **Rights** field

    The Software Entitlements (formerly Software Licenses) **Rights** field value in the License Entitlements [alm_entitlement] table is transferred to a new **Purchased rights** field, and name changed from **Rights** to **Active rights**

  - The **Software model** field for a software entitlement allocation (Software Entitlement [alm_license] table) is automatically set to the software model on the entitlement (License Entitlements [alm_entitlement] table)
  - The quantity for a software entitlement allocation (License Entitlements [alm_entitlement] table) is set to 1 unless there are multiple allocations

    If there are multiple software entitlement allocations for the same user or device, the allocations are aggregated into one record, the quantity is set to the count of aggregated records, and duplicate allocations are not allowed.

- Forms and lists

  Software Models, Entitlements (formerly Software License), Discovery Models, and Software Installations form and list layouts are modified to fit the new application

  Note: Any customizations to these forms and lists must be manually overwritten after plugin activation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Functionality

Functionality disabled

Functionality	Description
License and software counters	The scheduled job trigger for SAM License Counters is changed to None so that it is deactivated, and software counters are disabled.
Auto-match functionality	The auto-match functionality, which attempts to match a discovery model to a corresponding software model, is deactivated.
Navigation menu	The navigation menu for the Software Asset Management (com.snc.software_asset_management) plugin is deactivated and renamed.
Business rules	Legacy business rules applied to discovery models are disabled.

Software model relationship to software installation

Associating each software installation with a software model lets you perform audit reporting of licensable and non-licensable software.

Overview

Software models are automatically created for licensable and non-licensable products if the following system properties are enabled:

- *com.snc.samp.automaticsmrcreation*: for licensable products
- *com.snc.samp.automaticsmcreation*: for non-licensable products

If the system properties are enabled and a discovery model match exists, even if the match is generic, a software model will not be created. If the system properties are not enabled, the software model is just matched to a discovery model; no software models are created.

A match is made to the most specific software model. If no specific software model exists for the discovery model, then the match is made to the most generic software model.

During the matching process, if a matching software model is found, but it has an install condition on it then it's not considered to be a match. In such a scenario, a software model is automatically created without an install condition.

For each normalized publisher and normalized product pair in the Software Discovery Model (cmdb_sam_sw_discovery_model) table, the scheduled job, *SAM - Discovery Model to Software Model matching*, gets all software models with matching publisher and product. If the software model has no install condition, subscription condition, or DB option, the system gets matching discovery models with normalized publisher, normalized product, normalized edition, and normalized version values. Once a match is found, the software model reference is put on the software model column in the Software Discovery Model [cmdb_sam_sw_discovery_model] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Manually set software model

If you choose to match on a more generic software model than what the scheduled job *SAM - Discovery Model to Software Model matching* sets, you can manually set the desired software model in the form view on the Software Discovery Model (cmdb_sam_sw_discovery_model) table. The Automatically matched column becomes unchecked.

If a software model is set and the Automatically matched column's value is false, the scheduled job will not override the software model value on subsequent executions.

Sample matches

The following are some sample scenarios of software model and discovery model matches.

Discovery model	Software models	Matches with
SQL Server 2019 Enterprise	• SQL Server 2019 Enterprise • SQL Server 2019	SQL Server 2019 Enterprise software model
SQL Server 2019 Enterprise	• SQL Server 2019 Enterprise with install conditions • SQL Server 2019 (Edition is anything)	SQL Server 2019 software model
SQL Server 2019	SQL Server 2019 with install conditions (Edition is anything)	No match found. If the system property is enabled, a new software model will be created: SQL Server Enterprise (Version is anything).

Software Component Model table

The Software Component Model [cmdb_software_component_model] table stores component model records that serves industries and use cases across different solutions on the ServiceNow Platform.

Overview of Software Component Model table

The Software Component Model table extends from the System Component Model [cmdb_sw_component_model] table that resides in the Data Foundation Model (sn_cmdb_foundation) application. The Software Component Model table can consist of various entities.

A software component model record is automatically created whenever a discovery model meets either of the following conditions:

- Is normalized with a normalized version set.
- Is manually normalized with a normalized version set.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

A script runs to generate software component models from the normalized discovery models. This script uses the system property, *com.snc.sam.software_component.choice.version_level*, to determine the granularity of the normalized version. You can configure this system property to set the version level options, which include the following versions:

- MAJOR
- FULL
- BOTH
- NONE

Note: The system property is configured to the BOTH version by default. You can modify this setting by selecting any of the other available options. When entering values, ensure they are in lowercase format. As an example, to set the system property to NONE, enter "none" in the value field.

Two records are created in the Software Model Component table when a FULL version and a MAJOR version exist for the normalized discovery model. However, only one record is created if only the MAJOR version exists.

You can also manually create a software component model record in the Software Component Model [cmdb_software_component_model] table. If you have the Basic Software Asset Management or the Software Asset Management Professional application while creating the record, you can reference the Software Product [samp_sw_product] table. If you are not using the Software Asset Management application, you need to type in the software product name.

Upgrade information

When you upgrade to Zurich release and later releases, the scheduled job, *SAM - Generate software component model* does a one time run to generate component model records for all existing normalized discovery models which are then stored in the Software Component Model table.

After the upgrade, every time a new discovery model is normalized, the business rule, *Create software component model* that runs on the Software discovery model [cmdb_sam_sw_discovery_model] table gets triggered and automatically creates new software component model records for the new normalized discovery models.

Note: The Software Discovery Model table is available if you have Basic Software Asset Management or the Software Asset Management Professional application running on your ServiceNow instance.

Discovery model considerations

The following are some considerations to keep in mind for discovery models:

- System property changes: When a system property preference changes, the existing software component models retain their original settings. Only newly created version models adopt the updated system property.
- Model deletion or modification: If you delete or modify a software component model, the system won't recreate it from the original discovery model.
- Manual re-normalization: When a discovery model is manually normalized with new values, the existing software component model remains as is. The system creates a new software component model only if one does not already exist.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software license metrics

License metrics are set in software entitlements and used for reconciliation in various metric groups and software model combinations.

Each metric group has a set of license metrics that are specific to the publisher.

You can view the Metric Attributes related list in software models to set the attribute value. For more information, see Software model fields.

You can also add custom license metrics. For more information, see Add a custom license metric. You can use the Resource Value [samp_sw_resource_value] table to enhance the custom license metric capability by doing a 1:1 calculation between the Unit consumption column in the Resource Value [samp_sw_resource_value] table and the Licenses required column in the License Metric Results [samp_license_metric_result] table.

Adobe, Citrix, IBM (includes both IBM and Red Hat), Microsoft, Oracle, SAP, and VMware publisher packs are available as add-ons. They provide the capability to manage software licensed under the publisher licensing models.

Installing SaaS License Management adds the Subscription and Consumption metric groups.

You can view descriptions of your license metrics by selecting the reference icon next to the **License metric** field in your software entitlements.

License metrics

Metric group	License metric
Adobe **Note:** Adobe license metrics are visible only if the Adobe publisher pack is installed.	• Per Device: Licenses a device for the number of installations of software. • Per User: Licenses a user for the number of installations of software. • User Subscription: Licenses a user for the number of activated software subscriptions. When you run a reconciliation for software models with one or more entitlements, a right is consumed for each active unique software subscription record assigned to a user. ○ A right is considered **Allocated in use** when a user has both a user allocation and a subscription record. ○ A right is considered **Not Allocated in use** when a user doesn't have a user allocation but has a subscription record. ○ A right is considered **Allocated not in use** when a user has a user allocation but doesn't have a subscription record. If multiple rights are assigned to a user in a user allocation, then the user has the corresponding number of subscriptions for the software model. For example, a user has a user allocation with two rights but

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	only one subscription record related to a software model. In this example, one right is considered **Allocated in use** and the second right is considered **Allocated not in use**.
Citrix **Note:** Citrix license metrics are visible only if the Citrix publisher pack is installed. A discovery process is required for Citrix data to be collected. Admin users must create a Discovery schedule to run on the Citrix Delivery Controller for communication with the Citrix License Server. See for information on the Citrix discovery pattern and tables.	• Concurrent User: Licenses the number of simultaneous users accessing the program. • Per Device: Licenses a device for the number of installations of software. • Per Processor (CPU count): Licenses processors on either a physical server or virtual machine. • Per User: Licenses a user for the number of installations of software. If you're reconciling Citrix server software through a client access record, this license metric licenses the users that are accessing the server. • Per User/Device: License a unique user or a shared device. If the license is assigned to a user, they have unlimited connections to an unlimited number of devices. If the license is assigned to a device, an unlimited number of users can connect to a single device. If you create an entitlement with the Citrix metric group and the Per User/Device license metric is specified, the license calculator checks the compliance of all related software models based on the number of distinct users and devices. If you're reconciling Citrix server software through a client access record, this license metric licenses the users and devices that are accessing the server.
Common	• Per Core: Licenses cores on a physical server or virtual machine. `CPU core count * CPU count` • Per Device: Licenses a device for the number of installations of software. • Per Named Device: Licenses a specific device for the number of installations of software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	Note: You must add allocations. • Per Named User: Licenses a specific user for the number of installations of software. **Note:** You must add allocations. • Per Processor (CPU count): Licenses processors on either a physical server or virtual machine. • Per User: Licenses a user for the number of installations of software. • User CAL: Licenses each user that accesses your server, regardless of the number of devices that each user is using to access the server. • Device CAL: Licenses each device that accesses your server, regardless of the number of users that are using each device to access the server. • User/Device CAL: Licenses each user or device that accesses your server. • Resource Consumption. Consumption-based license metric that supports CAL reconciliation. A 1:1 ratio calculation between the Unit consumption column in the Resource Value [samp_sw_resource_value] table and the Licenses required column in the License Metric Results [samp_license_metric_result] table. • Concurrent User: Licenses the number of simultaneous users accessing the program. **Note:** For the Concurrent User license metric, create a related record in the Resource Value [samp_sw_resource_value] table to identify the resource being measured. For more information, see Create a resource value record.
Concurrent Licenses	These licenses are based on the number of simultaneous users or devices accessing the software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
Note: Concurrent Licenses license metrics are visible only if the Software Asset Management Professional for Engineering Applications (sn_samp_eng_app) plugin is activated along with OpenLM and Open iT integration.	• Floating: Shares and manages a pool of software among users or devices on a network. Checks out a license when a user or device requests access to the software. If there's no license left at the peak of license consumption, the user or device is denied access to the software. The number of rights consumed is based on the peak number of licenses checked out during a specified time. • Token: Shares and manages a pool of tokens among users or devices. Checks out a token or a set of tokens when a user or device requests access to the software. If there are no tokens left at the peak of license consumption, the user or device is denied access to the software. The number of rights consumed is based on the peak number of tokens checked out during a specified time. • Network: Shares and manages a pool of licenses among users or devices within a specified TCP or IP network. Checks out a license when a user or device requests access to the software. If there's no license left at the peak of license consumption, the user or device is denied access to the software. The number of rights consumed is based on the peak number of licenses checked out during a specified time.
Consumption **Note:** Consumption license metrics are visible only if the SaaS License Management is installed.	SaaS Consumption: Licenses an organization based on the unit of measure for the software units that can be consumed.
CrowdStrike	• Reserved Hourly Average Sensor: Counts the number of unique active endpoints per clock-hour and averages them over a rolling 28-day period. The count of Reserved Hourly Average Sensor Licenses resets at the start of each clock-hour. • Sensor Subscription: Calculates license usage by averaging endpoint counts over four consecutive weeks. Weekly endpoint counts are based on the total number of endpoints consumed in the previous seven days.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	Note: These license metrics are available with Yokohama Patch 1, Software Asset Management - SaaS License Management (sn_sam_saas_int) 15.0.8, and Software Asset Management (sn_itam_samp) 2.1.0 version onwards. If you are on any version for Yokohama below Patch 1, refer KB1801232.
IBM **Note:** IBM license metrics are visible only if the IBM publisher pack is installed.	• Authorized User: Licenses each user who is granted access to an IBM software product. • Authorized User Value Unit: Licenses the number of select users who are granted access to an IBM software product. • Employee User Value Unit: Licenses the total number of users within your organization who are granted access to an IBM software product. • External User Value Unit: Licenses the total number of users outside your organization who are granted access to an IBM software product. • Per Device: Licenses a device for the number of installations of software. • Per Named User: Licenses a specific user for the number of installations of software. • Per Processor (CPU count): Licenses processors on either a physical server or virtual machine. • Per User: Licenses a user for the number of installations of software. • Processor Value Unit (PVU): Licensing is based on the processor technology and the number of processors that are made available to the program. Full capacity PVU entitlements require licenses for all activated processor cores in the physical hardware environment. Subcapacity PVU entitlements require licenses for less than the full capacity of your server or group of servers. • Resource Value Unit (RVU): Licensing is based on the number of activated processor cores used or managed by a product. Full capacity RVU entitlements require licenses for all activated processor cores in the physical hardware environment. Subcapacity RVU entitlements require

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	licenses for less than the full capacity of your server or group of servers. • Virtual Processor Core (VPC): Licenses the number of virtual CPUs (vCPUs) that are available to or managed by a product. **Note:** This license metric is available only if you request and install the IBM License Compliance for Software Asset Management application from the ServiceNow Store. **Note:** The following license metrics are available from Australia Patch 6 onwards. For each license metric in the following list that you select on a software entitlement, create a related record in the Resource Value [samp_sw_resource_value] table to identify the resource being measured. For more information, see Create a resource value record. • Application Instance: Licenses each running instance of an IBM software product deployed on a server, container, or virtual environment. • Concurrent User: Licenses the number of simultaneous users accessing an IBM software product. • Connection: Licenses each connection or link between an IBM software product and a database, application, or device. • Events Per Second: Licenses the average number of security events processed per second by an IBM software product. • Floating User: Licenses each user accessing an IBM software product at any given moment. A separate entitlement is required for each installation accessed simultaneously by the same user. • Flows Per Minute: Licenses the average number of network flow records processed per minute by an IBM software product. • Managed Client Device: Licenses each client device whose configuration, security, or lifecycle is managed by an IBM software product. • Managed Device: Licenses each computing or network device whose configuration,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	state, security posture, or lifecycle is managed or monitored by an IBM software product. • Managed Virtual Server: Licenses each virtual server, or unpartitioned physical server, that is managed or monitored by an IBM software product. • Order Lines: Licenses each order line processed by an IBM software product. Sales and quote order lines are included; return and shipment lines are excluded. • Resource Value Unit - Decimal Petabyte Managed: Licensing is based on the number of decimal petabytes (10^{15} bytes) managed by an IBM software product, calculated using a tiered rate. • Storage Device: Licenses each independently powered, channel-attached storage device that runs, accesses, or is managed by an IBM software product. • Terabyte: Licenses each terabyte of data available to or managed by an IBM software product. The measurement basis is defined by the applicable License Information document. • Token: Licenses access to an IBM software product from a shared pool of tokens. Each installation consumes a predefined number of tokens per user session, and simultaneous consumption across users and installations must not exceed the licensed pool.
Microsoft **Note:** Microsoft license metrics are visible only if the Microsoft publisher pack is installed.	• Device CAL: Licenses the number of device client access licenses to server software. • Per Core: Licenses the cores on both the physical server and the virtual cores that support virtual machines and presents a cost-efficient model based on the number of rights used. For information on Per Core for Microsoft SQL Server Enterprise edition with Software Assurance, see Create entitlements for Microsoft Software Assurance in Software Asset Management classic.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	Note: Per Core (Physical Core) and Per Core (Virtual OSE) metrics is deprecated from the New York release. Any existing entitlements using Per Core (Physical Core) and Per Core (Virtual OSE) metrics are replaced with Per Core. You may see a change in your reconciliation results. • Per Core (with CAL): Licenses physical servers. The number of licenses depends on the number of installs and Operating System Environments (OSEs). Per Core (with CAL) licenses at the cluster level only when the physical server is an ESX Server and is a part of a cluster. This license metric uses all processors on every ESX Server within a cluster to determine the total number of cores or processors that must be licensed on the cluster. **Note:** If vMotion or DRS is enabled on a cluster, any virtual machine can move to any ESX Server within that cluster. The peak capacity of the cores on all the ESX Servers is considered for the rights needed to license the cluster. • Per Device: Licenses a device for the number of installations of software. • Per Processor: Licenses a set number of processors on a physical server. • Per User: Licenses a user for the number of installations of software. • Server (Per Instance): Licenses a set number of software installations on either a physical server or virtual machine. • Server (Per Server): Licenses all software installations on a physical server and any virtual machines hosted by the physical server. • User CAL: Licenses the number of user client access licenses to server software. • User Subscription: Licenses a user for the number of activated software subscriptions. When reconciliation is run for a software model that has one or more entitlements

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	with the User Subscription license metric, one right is consumed for each active unique software subscription record assigned to a user.
Oracle **Note:** Oracle license metrics are visible only if the Oracle publisher pack is installed.	• Named User Plus: Licenses the physical host. If you are reconciling Oracle server software, such as Oracle Database or Oracle WebLogic Server, through a client access record, this license metric licenses the users that are accessing the server. • Per Processor: Licenses the number of cores on a processor. **Note:** For the Oracle **Per Processor** license metric, enable Hyper-Threading if you're using a virtual machine (VM) running Amazon Web Services (AWS). • Employee: Licenses the total number of full-time, part-time, and temporary employees, including those employed directly and indirectly through agents, contractors, and consultants according to Oracle's definition of internal business operations. **Note:** The number of licenses required is determined by the total number of employees and not the number of employees using Oracle Java SE Universal. **Note:** You can select the level of aggregation for the reconciliation calculation of VMware -based Oracle instances using the `com.snc.samp.oracle.reconlevel` property. See Software Asset Management properties.
Red Hat **Note:** Red Hat license metrics are visible only if the IBM publisher pack is installed.	• Per Socket-pair: Licenses the number of socket pairs on the physical host or the number of virtual machine (VM) pairs running a Red Hat Enterprise Linux server on a physical host.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	• Per Core: Licenses the cores on both the virtual cores that support virtual machines and the physical server. It also presents a cost-efficient model based on the number of rights used.
SAP **Note:** SAP license metrics are visible only if the SAP publisher pack is installed.	• Named User: Licenses the number of named users that can be assigned a Named User Type. The Named User Type is defined by the software model linked to the entitlement. • Engine Measurement: Licenses the amount of engine usage. • Digital Access: Licenses the indirect usage of SAP applications through a third-party application or a non-SAP intermediary software by the count of documents created by the third-party application. • User Subscription: Licenses the number of users that are authorized to access specified solution capabilities of SAP S/4HANA Cloud, Public Edition. • Full Usage Equivalent (FUE): Licenses the number of users that are authorized to access specified solution capabilities of SAP S/4HANA Cloud, Private Edition.
Subscription **Note:** Subscription license metrics are visible only if the SaaS License Management is installed.	User Subscription: Licenses for the number of users.
VMware **Note:** VMware license metrics are visible only if the VMware publisher pack is installed.	• Per Application Instance: Licenses the number of application instances. Applies to VMware products: vCenter Server software. • Per Device: Licenses a device for the number of installations of software. Applies to the VMware suite of products: Horizon FLEX, ThinApp, ThinApp Virtualization Packager, and Mirage Windows Migration. • Per Named User: Licenses a specific user for the number of installations of software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics (continued)

Metric group	License metric
	Applies to VMware named users: Horizon Advanced, Horizon Enterprise, Horizon Suite, Mirage, Horizon Socialcast on Premise, Workspace (Portal), Workspace Suite, Horizon Air, Horizon Air Desktop DR, ThinApp, ThinApp Virtualization Packager, vRealize Operations for Horizon, User Environment Manager, vRealize Business. • Per OSI: Licenses the operating system (OS) that is running on a virtual machine (VM) or physical host. Applies to the VMware suite of products: vRealize Operations, vRealize Log Insight, vRealize Automation, vRealize Business for Cloud, and vRealize Code Stream. • Per Processor: Licenses the processors (CPUs) on a physical host. Each CPU requires one right for every 32 cores. A **Maximum cores per processor** metric attribute with a default value of 32 is automatically created on software models for VMware per processor entitlements. This metric attribute is used during reconciliation to determine license compliance. Applies to VMware suite products: vSphere, vSphere with Operations Management. • Per Core: Licenses the processor cores on a physical host. A minimum of 16 cores must be licensed per processor. Applies to subscription-based VMware suite products: VMware vSphere Standard (VVS) and VMware vSphere Essentials Plus (VVEP)

Unlimited software licenses

Unlimited software licenses help you to create entitlements with unlimited allocations and unlimited rights, allowing you to license any number of software installations with no true-up cost.

A sam_admin or sam_user role can specify an entitlement as an unlimited license which allows for unlimited allocations (user or device allocations) and does not classify the license metric results as non-compliant.

While creating or importing an entitlement, you can select the **Unlimited license** check box on the Software Entitlement page or on the Import Entitlement page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Considerations for unlimited licenses

- Reconciliation process takes unlimited licenses into account where the software installations match and are licensed. Unlimited license is given priority over fixed amount license
- License metric results are generated separately for unlimited licenses.
- An unlimited license perpetual entitlement can be associated to only one unlimited license maintenance entitlement.
- Unit cost is equal to the total cost.
- Downgrade rights are supported for unlimited licenses.
- **Purchased rights**, **Active rights**, and **Allocations available** fields are not displayed for an unlimited license on the Software Entitlement page.

Supported license metrics and license types

The following license metrics are supported across all metric groups for unlimited licenses:

- Per User
- Per Device
- Per Named User
- Per Named Device
- User Subscription
- Named User Plus
- Per Processor

The following license types are supported for unlimited licenses:

- Perpetual
- Maintenance/Software Assurance
- Perpetual + Maintenance/Perpetual + Software Assurance
- Subscription

Software discovery and normalization

Identify all software installed within your organization's IT environment, including details such as publisher, product, and version. Then, standardize and validate this discovered data to ensure accuracy and consistency through software normalization.

Software discovery

After you've imported your entitlements, use ServiceNow Discovery or Microsoft SCCM to discover software installations in your environment and transfer that data into the ServiceNow AI Platform.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Infographic showing setting up of ServiceNow Discovery or Microsoft SCCM

While you may use Discovery Home for datacenters and Microsoft SCCM for desktop environments, you can integrate other third-party discovery solutions with CMDB to support Software Asset Management. To integrate a different discovery solution, add it manually, or you can download an application, from the ServiceNow Store. For more information about integrating a discovery source manually, see the Customer Success Center.

To learn more about collecting data after you've integrated with both Discovery and SCCM, see Collect software data with either SCCM or Discovery.

Discovery integration

ServiceNow Discovery is used to automatically populate the Software Installations table so the software can be normalized and reconciled.

Note: To use Discovery, the Discovery plugin must be activated.

Discovery uses patterns in the discovery process that can be created or customized. The base system contains a wide range of patterns that cover most industry standard network devices and applications. The following are some of the base system patterns used by Software Asset Management.

- Citrix XenApp
- Citrix XenDesktop,
- VMware vCenter
- Microsoft SQL Server
- Microsoft Exchange Server
- Oracle Database

You can also customize other patterns for Software Asset Management. For more information, see Create or modify patterns.

Discovered software is stored in the Software Installations [cmdb_sam_sw_install] table.

When software install records are written to the Software Installations table, a business rule verifies whether the unique combination of the discovered publisher, discovered product, and discovered version exist in the Discovery Model table.

- If so, the reference to the discovery model is set in the Software Installations table.
- If not, a new record is created in the Discovery Model table, and that discovery model reference is set in the Software Installations table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After discovery, normalization is run.

For more information on Discovery, see Discovery with Software Asset Management.

SCCM integration

You can use SCCM by itself or with Discovery Home to identify software on your devices.

Note: While you may use Microsoft SCCM for discovering software installations in your desktop environments, you can integrate other third-party tools.

Both Microsoft SCCM 2012 v2 and 2016 plugins are certified with Software Asset Management. The corresponding Microsoft SCCM Integration plugin must be installed to integrate Microsoft SCCM with Software Asset Management.

Microsoft SCCM Integration plugins:

- Integration — Microsoft SCCM 2012 v2 (com.snc.integration.sccm2012v2) plugin
- Integration — Microsoft SCCM 2016 (com.snc.integration.sccm2016) plugin

Microsoft SCCM Software Usage plugins:

- Integration — Microsoft SCCM 2012 v2 Software Usage (com.snc.samp_usage_sccm) plugin
- Integration — Microsoft SCCM 2016 Software Usage (com.snc.samp.usage_sccm_2016) plugin

The Integration — Microsoft SCCM 2016 plugin is compatible with SCCM versions 1606, 1906, 1910, and 2002.

Important: These Microsoft SCCM plugins will be deprecated in the Tokyo release. If you are integrating with SCCM for the first time, request and install the Service Graph connector for Microsoft SCCM application from the ServiceNow Store instead. If you have already activated one of the Microsoft SCCM plugins on your ServiceNow instance, use the Migration Readiness Tool for Service Graph Connector for SCCM store application to prepare your instance for migration from the Microsoft SCCM plugin to the Service Graph connector. See Service Graph connector for Microsoft SCCM for more information on the Service Graph connector.

For more information on SCCM and how to import your data into your instance, see Microsoft SCCM software usage.

Software normalization

Standardize discovered software model data within the Software Asset Management application through the process of software model normalization.

When a new software discovery model is found in the Configuration Management Database (CMDB), the normalization process compares the discovered software publisher, product, and version, and edition values against the Software Asset ManagementContent Library.

When the normalization process completes, matches are added to the corresponding normalized columns (Publisher, Product, Version, and Edition) of the Software Discovery Model [cmdb_sam_sw_discovery_model] table. The normalized fields are then used in various downstream processes and use-cases across Software Asset Management, such as reconciliation of entitlements purchase, calculation of license position and management of software llifecycle. For example, the discovered publisher Microsoft Corp could be normalized to Microsoft for the normalized Publisher column.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Benefits of normalization

- Normalization establishes a definitive inventory of all software discovered within your organization. Maintaining a comprehensive and accurate list of installed software is essential for both software audit readiness and effective IT operations. Without normalization, your organization encounters many different names for the same software publisher, which creates confusion and requires substantial effort to rationalize the data.
- By implementing normalization, you streamline your software inventory, improve data consistency, and enhance the reliability of your reporting processes.
- Normalization makes software reconciliation more accurate and efficient. It uses standard values to match software found with entitlements you own. This leads to more accurate reconciliation results. You can plan and complete software audits more easily because the counts are correct and match your records.
- The normalization process enables standardizing installation data from multiple discovery tools.

Scheduled jobs

To standardize software discovery models, they must be normalized. You can either manually update the records with normalization content or let the normalization capability within Software Asset Management Professional to compare and standardize your records against Software Asset Management Content Library.

The scheduled job *`SAM - Normalize discovery models using content library rules`* runs daily to normalize discovery models based on content rules and assign a normalization status to the discovery model record. For more information about the different normalization statuses, see Normalization statuses.

Note: You can also opt in for Machine Learning normalization by activating the Software Asset Management – Machine Learning Normalization (com.sn_sam_ml_normalization) plugin. For more information, see Normalization of discovery models using machine learning.

The scheduled job, *`SAM - Discovery Model Normalization job`* runs daily to update the normalization trend charts on the Normalization and content dashboard. For more information about normalization trend charts, see Normalization and content dashboard.

Manual normalization

Manual normalization is the process of updating a software discovery model when the platform hasn't fully normalized it. You can manually normalize a software discovery model when its normalization status is **Partially Normalized**, **Publisher Normalized**, or **Match Not Found**. For more information about manually normalizing a software discovery model, see Manually normalize a software model in the Software Asset Workspace.

Normalization suggestion

When a software discovery model is compared against the Software Asset Management plugin Content Library, normalization suggestions are generated for discovery models. These suggestions predict fields such as **Publisher**, **Product**, and **Version** based on the discovery source. You can accept or reject these suggestions. For more information about viewing normalization suggestions, see View normalization suggestions in the Software Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Revert normalization

You can manually revert normalization, which removes all normalized values and sets the discovery model's status to **Match not found**. You can revert the normalization of discovery models with a status of **Normalized**, **Partially Normalized**, or **Publisher Normalized** to **Match Not Found**. For more information about reverting the software discovery model normalization, see Revert normalization in the workspace.

Note: Discovery models with a status of **Manually Normalized** and discovery models that have been normalized using pattern normalization rules can't be reverted.

Software model normalization rules

The Software Asset Management application uses the following normalization rules to normalize the software discovery models:

- **Product Map and Package Map normalization**: The ServiceNow® Content Service creates rules for each distinct discovery model. Even if the difference is minor, a separate normalization rule is developed. For example, if there are 1,000 discovery models, then 1,000 Product Map normalization or Package Map normalization rules are created for normalizing the models.
- **Pattern normalization**: Creates a single normalization rule that can address multiple discovery models with a specific data pattern. The rule looks for pattern matches between discovered fields and normalized values, and updates the normalized fields accordingly. For instance, to normalize software discovery model that contains Microsoft Office 2019, you can define a pattern normalization rule. Any discovery models starting with Microsoft Office 2019 is treated as equivalent and mapped to Microsoft Office.
- **Enhanced pattern normalization**: Handles a wide range of complex scenarios encountered during software model discovery and product identification. This normalization rule addresses variations in product names, edition names, and version identifiers by using configured patterns to match and standardize different patterns. For example, if an edition is labeled as standard, STD, stand, or any other variant, a pattern rule can be established to treat such instances as equivalent and map them to the standard edition. The Software Asset Management application enables conditional mapping. The presence or absence of specific terms determines whether an item is included in or excluded from the enhanced pattern normalization rule coverage. This rule manages the different formats and scenarios encountered in discovery models, confirming consistency and accuracy in normalization.
- **Wide-net normalization**: If certain software discovery models share similar discovered field values, the Software Asset Management application normalizes them using wide-net normalization principles, which reduces the need for the ServiceNow® Content Service to create separate normalization rules for each product.

  Note: Only certain software products are eligible for wide-net normalization. These software products are determined by the ServiceNow® Content Service.

Related topics

- Manually normalize a software model in the Software Asset Workspace
- View normalization suggestions in the Software Asset Workspace
- Revert normalization in the workspace
- Normalization statuses
- Normalization of discovery models using machine learning
- Normalization and content dashboard

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Normalization suggestions for discovery models

Normalization suggestions are created for all manually normalized discovery models. You can accept or reject these suggestions.

Overview of normalization suggestions

During the weekly normalization process, normalization suggestions are created in both the following scenarios:

- If even one discovery model field value differs from the suggested normalization values in the Content Service.
- If all the discovery model field values are the same as the suggested normalization values in the Content Service.

If the system property, *com.snc.samp.auto_accept_normalization_suggestion* is enabled, normalization suggestions are automatically accepted if there are no differences between the suggested normalization values and the manually normalized values. This property is enabled by default.

Note: For domain separated environments, individual domains can override this system property for their own domain by creating a new sys_application_property value record.

If you accept a suggestion or if it was automatically accepted by the system property, then the status of the discovery model changes to **Normalized** and all suggested values are copied over to the discovery model's normalized fields. If you reject a suggestion, the manually normalized values do not get changed.

The records are contained in the Normalization Suggestion [samp_normalization_suggestion] table.

Accepting or rejection suggestions

If you **Accept** the suggestion:

- Publisher, Product, Version, Edition, Platform, and Language of the discovery model is updated with the values from the normalization rule.
- Normalization status changes from Manually Normalized to Normalized.
- Normalization Suggestion status changes to Accepted
- Normalization date on the discovery model is updated to when the suggestion was accepted.

If you **Reject** the suggestion:

- Discovery Model retains the manually normalized values and remains in Manually Normalized status.
- Normalization Suggestion status changes to Rejected.

Normalization Suggestions form

Field	Description
Discovery model	Software discovery model that represents the installed software.
Suggestion status	Suggested status of the normalization process.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Normalization Suggestions form (continued)

Field	Description
Discovered publisher	Discovered publisher of the software.
Discovered product	Discovered name of the software.
Discovered version	Discovered version of the software.
Suggested Normalization	
Suggested publisher	Suggested publisher of the software.
Suggested product	Suggested name of the software.
Suggested version	Suggested version of the software.
Suggested edition	Suggested edition of the software.
Suggested platform	Suggested platform of the software.
Suggested language	Suggested language of the software.
Publisher	Normalized publisher of the software.
Product	Normalized product name of the software.
Version	Normalized version of the software product.
Edition	Normalized edition of the software product.
Platform	Normalized platform of the software product.
Language	Normalized language of the software product.

Normalization of discovery models using machine learning

Use machine learning to improve your normalization rates in real time by normalizing your unrecognized discovered software.

The Software Asset Management application uses machine learning to improve normalization of discovery models. The prediction values currently supported by machine learning are version, full version, and edition.

Opt in for machine learning normalization by activating the Software Asset Management – Machine Learning Normalization (com.sn_sam_ml_normalization) plugin. Starting with the Brazil release, machine learning normalization capabilities are available to regulated markets for ServiceNow Protected Platform (SPP) in Singapore (SG) and Australia (AU).

Once the plugin is activated, ensure that the *Enable ML Normalization for discovered software* (com.snc.samp.enable.ml_normalization) property is selected. For more details on this property, see Software Asset Management properties. You can opt out of machine learning normalization by disabling this property. If you opt out, normalization of discovery models only takes place against the content service rules.

The scheduled job, *SAM-Normalize discovery models using content library rules*, triggers on a daily basis and normalizes the discovery models based on the content rules. This scheduled job runs irrespective of whether the Software Asset Management – Machine Learning Normalization plugin is activated or not. If this plugin is activated, then the partially normalized discovery models are picked up by another scheduled job, *SAM-Normalize discovery models using machine learning*. The scheduled job, *SAM-Normalize discovery models using content library rules* is

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

enhanced to invoke the on-demand scheduled job, *SAM-Normalize discovery models using machine learning* and also validates machine learning predictions.

Once the scheduled job, *SAM-Normalize discovery models using machine learning* is complete, you can view the updated values in the following machine learning based columns in the Software Discovery Model [cmdb_sam_sw_discovery_model] table:

- ML prediction values: Indicates the predicted values for the attributes.
- ML model version: Indicates the model version that was used for predicting the attributes.
- ML normalization status: Indicates the status of machine learning normalization. Values for this column include:
  - ML normalized: Discovery model is normalized by machine learning
  - Reverted: Discovery model is normalized by machine learning but the user reverted the normalized values
  - Content overridden: Machine learning predictions over-written by new content rules

Note: The status of the scheduled job, *SAM-Normalize discovery models using machine learning* is tracked in the Software Asset Job Result [samp_job_log] table.

As the content rules are always getting updated, the weekly scheduled job *SAM-Normalize discovery models using content library rules* picks up the discovery models normalized by machine learning and tries to normalize these models with the latest content rules. If the predicted values of machine learning differ from the predictive values of the content service, the machine learning predictions are overwritten with the content service values. The content service prediction values always get precedence over the machine learning prediction values.

Note: For details on the normalization rules for the predictive values, refer to tables titled **Normalization rules for licensed products** and**Normalization rules for non licensed products**.

You can manually normalize a discovery model by reverting the normalization values. When you revert normalizations in the Software Discovery Model form, all the normalized values, got from content and machine learning, are removed. The discovery model reverts to a status of Match not Found.

Note: When you revert a discovery model normalized by machine learning, the content rules are not deactivated. However, if a discovery model is normalized only by content rules, then the content rules are deactivated.

Normalization rules for licensed products

Fields	Normalization status
All fields are normalized **Note:** All the fields include publisher, product, version, edition, and full version.	Normalized
Only the publisher is normalized	Publisher normalized
If none of the fields are normalized: publisher, product, version, edition, full version	Match not found
Only product and publisher are normalized.	Partially normalized

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Normalization rules for non licensed products

Fields	Normalization status
If only publisher and product are normalized	Normalized
Only the publisher is normalized	Publisher normalized
If none of the fields are normalized: publisher, product, version, edition, full version	Match not found

Duplicate software installations in the Software Asset Management application

Duplicate software installation are created when you discover software installations with the same publisher, product, version, and edition through multiple discovery sources.

A software installation record is created for each software record in the Software Installation [cmdb_sam_sw_install] table.

By default, the Software Asset Management application prioritizes IBM software installations that are discovered through ServiceNow® discovery. Duplicate entries are initially marked as false in the Active column in the Software Installation [cmdb_sam_sw_install] table. When the *SAM - Deduplicate Install Table* scheduled job runs, records for all IBM software installations that are discovered through ServiceNow® discovery are marked as active, while records for the same software installations that are discovered through an authorized Software Asset Management discovery provider are marked as inactive.

The *SAM - Deduplicate Install Table* scheduled job ensures that only one software installation record is marked as active and included in reconciliation.

Software install deduplication

Software install deduplication consolidates redundant installation records for the same product on a single device, improving data accuracy and license compliance.

Software upgrades, incomplete removals of installs, and multiple discovery sources often create duplicate software installations on the same device. Deduplication is the process of identifying redundant installation records and designating one record as the primary installation while marking others as duplicates. Without deduplication, inflated license counts, inaccurate entitlement reports, and conflicting installation records complicate compliance and cost management.

Starting with the Brazil release, the deduplication logic includes the following improvements:

- The deduplication logic correctly identifies duplicates within the same discovery source or across discovery sources consistently.
- When duplicates are found, the logic has a consistent way to choose which record to keep as the primary installation.
- The Software Asset Management application users get a clear explanation of why a particular installation is marked as primary and others as duplicates.

Configure a product-level deduplication rule

The product must exist as a normalized record in the Software Models [cmdb_software_product_model] table before you can assign a deduplication rule. A deduplication rule can't be assigned to unnormalized products.

The software install deduplication framework provides three version-matching levels that control how the system identifies duplicate installations:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Exact

The system matches installations only when the full version string is identical. For example, SQL Server 2019.1 and SQL Server 2019 are treated as different versions and aren't deduplicated together. Use this level for software with discrete version lifecycles.

Major

The system matches installations when the major version is the same, regardless of point release differences. For example, both SQL Server 2019.1 and SQL Server 2019 are treated as the same major version and are deduplicated together. Use this level for most enterprise software.

Note: This is the default version-matching level applied when a custom rule is not defined for a product.

Any

The system ignores version entirely and consolidates all installations of the same software title on a device into a single primary installation. Use this level for volatile or auto-updating software such as Google Chrome, where version differences are frequent and don't impact licensing.

For more information about configuring a deduplication rule for a software product, see Create a custom deduplication rule.

Software install deduplication logic

The deduplication logic operates in two main stages:

Duplicate detection

The system compares software installations and identifies duplicates based on version matching. By default, the system considers installations duplicate if the major version component of the normalized version is identical. For example, SQL Server Enterprise 2019.1 and 2019.3 are duplicates because both have major version 19. However, you can configure custom comparison levels if required. For more information about configuring deduplication rule for a software product, see Create a custom deduplication rule.

Primary selection

After the deduplication logic identifies duplicate installations, it applies tiered selection criteria to choose which installation becomes the primary record. The criteria tiers are evaluated in sequence, and if a tie occurs at any tier, the system moves to the next tier. The selection criteria, in order of priority, are:

- Discovery source reliability: Installations from more reliable discovery sources are preferred.
- Information completeness: Installations with more complete information are preferred.
- Installation version: The latest version is selected as primary.

For example, your organization operates multiple servers and workstations running SQL Server Enterprise. Over time, discovery tools scan your environment and report installations of this product across different devices, from different discovery sources, and at different scan times. Your software records now contain three separate installation records for SQL Server Enterprise, each showing slightly different version information:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SQL Server installations on the device

Installation	Version	Scan Date	Completeness
SQL Server Install #1	2019	Jan 15, 2026	95% (all major files present)
SQL Server Install #2	2019.1	Jul 10, 2026	100% (complete installation)
SQL Server Install #3	2019	Jul 8, 2026	60% (partial, missing executables)

Without deduplication, your licensing compliance report counts all three installations. Entitlement data shows three instances when, in reality, fewer active SQL Server installations may exist in your environment.

Related topics

Create a custom deduplication rule

Software Asset Management software suites

Software Suites is a way for a software publisher to group related applications as a set.

Overview of software suites

Create a suite and add components to the suite so that your organizations' rights are correctly counted during reconciliation.

An example for client software suites is the Microsoft Office suite, which comprises Word, Excel, PowerPoint, Outlook, and Access. Microsoft Office is considered the suite parent and the suite components are the suite children.

A more complex example is the “suite of suites” which is common in server software. Microsoft Core Infrastructure Server (CIS) Suite has two suite components: Windows Server and System Center (which is also a suite).

Suite components are licensed together using a suite license rather than each software component needing an individual license. Therefore, an entitlement for the suite parent licenses all suite components including suite children that are also suites themselves.

For software subscriptions, only one user subscription suite license is required for each user. For example, the Microsoft 365 suite includes the following components: Office 365, EMS (Enterprise Mobility plus Security), and Windows 10. One Microsoft 365 license entitles a user to use one or more of the components.

The Software Suites [cmdb_m2m_suite_model] table captures the relationship between a suite parent and a suite child.

For any software model, you can specify whether the model is a suite (parent) or a component (child). A software model can be a component in multiple suites. For example, Microsoft Word is a component in two suites: Microsoft Office Standard and Microsoft Office Professional. Although you can set a single software model as both a suite and a component, software isn’t typically sold as nested suites.

Suite information such as **Suite Components** and **Suite Parents** can be seen as tabs in the Software Model form. Whenever a software model is automatically created as part of a scheduled job, its child components are automatically created and appear in the Suite Components tab in the software model form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Predefined suites

The Software Asset Management content library contains predefined suites to simplify your user experience. If suite content exists for a product, the suite information automatically populates the **Suite Components** tab in the Software Model from. Updates to the suite content are downloaded and existing suite definitions are updated via scheduled jobs.

Allocations

Allocations are used to apply a license to a device or user. In the context of suites, allocations enable the software asset manager to apply an individual component license to a user/device instead of the suite license.

Use case for allocations

An organization has both Microsoft 365 E5 (suite) entitlements and Windows 10 entitlements. User A has Windows 10, Word, Excel, and other components of Office 365 installed on their device. User A is allocated the Windows 10 entitlement. User A's Windows 10 installation is licensed with the Windows 10 entitlement rather than the Microsoft 365 suite entitlement while the remaining components are licensed as part of the Microsoft 365 suite.

Discovery maps

Discovery Maps (DMAPs) are variations of the software as predefined in the SAMP content library. Although a software model can be defined manually by setting the Publisher, Product, Version, Edition, the best approach is using DMAPs whenever possible. The DMAPs associate the relevant content with the Software Model automatically like the suite relationships, downgrade models, lifecycle, and next version.

Hybrid and subscription software suites

Software Asset Management supports hybrid and subscription-based software suites. In a hybrid software suite, either the suite parent or child component is subscription-based. In a subscription-based software suite, both the suite parent and child component are subscription-based. The license that you use to determine compliance depends on whether the suite parent and child component are subscription-based:

- If only the suite parent is subscription-based, then all the child component installations are inferred as part of the suite parent. You can determine your license compliance using the suite parent license.
- If only the child component of a suite parent is subscription-based, then the instances of that child component aren't inferred as part of the suite parent. You can determine your license compliance using the child component license.
- If both the suite parent and child components are subscription-based, then the instances of the child components are inferred as part of the suite parent. You can determine your license compliance using the suite parent license. For example, Microsoft 365 E5 is a subscription-based software suite that includes the Office 365 E5, EMS E5, and Windows 10 subscription software. Since both the suite parent and child components are subscription-based, they're reconciled against the Microsoft 365 E5 parent license.

Software suites inference

Suite inference identifies whether an installed or subscribed software product is part of a suite and applies the most efficient suite license during reconciliation.

https://player.vimeo.com/video/1076402507?h=831df261cd&badge=0&autopause=0&player_id=0&app_id=58479

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Suite inference flow

The process of suite inference runs in two stages:

1. Building the suite structure: The suite engine builds the suite structure based on entitlements, software models, and suite relationships.
2. Inferring the optimal suite: The suite engine processes install and subscription records to identify the most optimal suite parent for each record.

After the suite engine runs, the **Inferred suite** column is updated for all install and subscription records that are part of a suite. The column displays a reference to the software model of the most optimal suite parent, and the corresponding entitlements are applied to each stamped record. For more information about how the suite engine selects the optimal suite, see the Suite inference rules.

Note: Users with the model_manager role can navigate to **Product Catalog** > **Product Model** > **Software Models**, but can't administer all aspects of software models.

Automated suite inference logic

The Software Asset Management application calculates the inference percentage in automated mode based on your software install footprint and current entitlements. For example, you have only Windows Server installations, no System Centre installations, and hold entitlements only for Core Infrastructure Server (CIS). The inference percentage will be set to 0%. This value is calculated during reconciliation so you don't have to manually configure it.

With the automated suite inference logic, there's no longer a need to create product install conditions for common applications such as Visual Studio. The automated suite inference logic makes sure that the inference is done correctly.

Consider an environment with three clusters, each containing two physical hosts with 16 cores per host. Because virtual machines can migrate between hosts in a cluster, all 32 cores in each cluster are included in the licensing requirement.

Installed software

Cluster	Installed software	Core requirement
Cluster A	Windows Server only	32 cores
Cluster B	Windows Server and System Center	32 cores
Cluster C	Windows Server and System Center	32 cores

Available license rights

Entitlements	Available rights	Coverage
CIS	32 core rights	Windows Server and System Center
Windows Server	64 core rights	Windows Server
System Center	32 core rights	System Center

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Only enough CIS rights are available to cover one 32-core cluster. During reconciliation, the Software Asset Management application evaluates the installed software and available license rights for each cluster and applies licenses as follows:

Cluster A

Only Windows Server is installed. Applying a CIS entitlement would include unused System Center rights. The Software Asset Management application consumes 32 Windows Server core rights.

Cluster B or C

Both Windows Server and System Center are installed. CIS covers both products with the same 32 core rights. The Software Asset Management application consumes the 32 available CIS core rights.

Remaining cluster

Both products are installed, but CIS rights are already consumed. The Software Asset Management application applies individual entitlements, consuming 32 Windows Server and 32 System Center core rights.

License consumption after reconciliation

Cluster	License
Cluster A	32 Windows Server core rights
Cluster B or C	32 CIS core rights
Remaining cluster	32 Windows Server + 32 System Center core rights

The Software Asset Management application automatically determines when a suite license provides the most efficient coverage and when component licenses must be used. No manual inference threshold or product install condition is required.

If you prefer to calculate the inference percentage manually and revert to the default 75%, you must override the automated option. To override, clear the **Automatic determination of inference** option after navigating to **Product Catalog** > **Product Model** > **Software Models** > **Suite Components**.

Inference options

Note: If the system property *com.snc.sam.auto_suite_inference* is set to true, the Inference number and percent is automatically determined and the **Inference option** isn't visible. Additionally, the parent software model suite is automatically inferred for a software model based on its child software models.

Use the **Mandatory** and **Inference option** fields when the suite parent isn’t defined in the install table.

The following table describes the available values for the **Inference option** and **Mandatory** fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value	Description
Mandatory	• Optional • Always Mandatory • Mandatory Group	Enforces whether a component must be installed to infer that the suite is installed.
Inference option	• Number • Percent	The **Inference Number** specifies the number of components installed for the suite. The number can be any non-negative number. **Note:** For any new software models being created with suite components, the **Number** option is selected by default. The **Inference Percent** specifies what percentage of the components must be installed for the suite. **Note:** For existing software models with suite components that were using the inference percent, the **Percent** option is selected by default. If preferred, you can switch to the **Number** option.

Suite inference rules

The suite engine applies the following rules to select the most optimal suite for a software installation:

1. If one of the software installations belongs to the suite software model, the suite is inferred directly without the need to meet the Inference percentage or Inference number.
2. If rule 1 isn't met, then any suite that meets the Inference percentage or Inference number on that device can be considered an Inferred suite candidate.
3. The candidate with the highest number of installed components is selected.
4. If there's a tie, the suite with the lower downgrade is selected. For example, if Office 2016 and Office 2013 are both candidates with the same number of installed components, Office 2013 is selected because it's the downgrade of Office 2016.
5. If there's still a tie, the one with the highest percentage of installed components is selected.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Suite inference rules for Microsoft license metrics

Based on the system property *com.snc.sam.auto_suite_inference*, the Software Asset Management application uses suite or component licenses. For example, if you have both CIS suites and Windows Server installations, both have their individual licenses. If Windows Server installations are discovered, then the Software Asset Management application first licenses using the available Windows Server licenses. CIS licenses are used only after all the Windows Server licenses have been used.

When the system property *com.snc.sam.auto_suite_inference* is set to true, the rules ranking for Microsoft license metrics are as follows:

1. If there are multiple suites that can be inferred for the component, then the suite which meets the inference number or percent is preferred.
2. The suite candidate with the highest number of installed components is preferred.
3. If there's a tie, the suite with the lower downgrade rights is chosen. For example, CIS 2019 and CIS 2016 are both candidates and have the same number of installed components. However, since CIS 2016 is the downgrade of CIS 2019 and it has fewer downgrade rights, CIS 2016 is chosen.
4. The parent suite that meets the inference number or percent is preferred over the child suite. If the parent suite doesn't meet the inference percent, the child suite is preferred.
5. If there's still a tie, the one with the highest percentage of installed components is preferred.

Examples for suite inference

The following examples show how inference options and rules work in practice in case of manual calculation.

1. Inference percent with an always mandatory component

   You set the **Inference percent** to 75% and the **Mandatory** field to **Always Mandatory** for Microsoft Access. For Microsoft Office Professional to be inferred on a device, Microsoft Access must be installed along with at least three of the following four components: Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and Microsoft Outlook.

2. Inference number

   You set the **Inference number** to 2 for Microsoft Office. If Microsoft Word and Microsoft Excel are both installed on a device, the inference number condition is met. Also, the Microsoft Office suite license is applied instead of the individual component licenses.

3. Inference percent with a threshold

   You set the **Inference percent** to 50% for CIS, which has two components: Windows Server and System Center. If more than 50% of the components are installed, the CIS suite license is applied. If fewer than 50% are installed, the individual component licenses are used.

Related topics

Managing software suites

Managing software suites

Simplify licensing and lower the cost of licenses from vendors. Get visibility into your complex suite licenses, manage compliance, and optimize your spending on these licenses.

Create a suite and add components to the suite so that your organizations' rights are accurately counted during reconciliation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

A software suite is a group of related software that is offered as one unit. An example is the Microsoft Office Professional suite that includes PowerPoint, Word, Excel, Outlook, and Access.

Another example of a server-side suite is the Microsoft Core Infrastructure Server (CIS) Suite. The CIS Suite can include the Windows Server software as well as the System Center suite, which includes Configuration Manager, Operations Manager, and other titles. CIS Suite, which is licensed with Microsoft server metrics (Per Core, Per Core (with CAL), Per Instance, Per Processor, Per Server), are considered during reconciliation.

For any software model, you can specify whether the model is a suite (parent) or a component (child). A software model can be a component in multiple suites. For example, Microsoft Word is a component in two suites: Microsoft Office Standard and Microsoft Office Professional. Although you can set a single software model as both a suite and a component, software isn't typically sold as nested suites.

Whenever a software model is automatically created as part of a scheduled job, its child components are automatically created and appear in the Suite Components section.

Use the **Inference percent** or **Inference number** and **Mandatory** fields when the suite parent isn't defined in the install table.

Note: If the system property *com.snc.sam.auto_suite_inference* is set to true, the Inference number and percent is automatically determined. Additionally, the parent software model suite is automatically inferred for a software model based on its child software models.

- **Inference percent**: Specifies the percentage of the components that must be installed for the suite.
- **Inference Number**: Specifies the number of components installed for the suite.
- **Mandatory**: Enforces whether a specific component must be installed to infer that the suite is installed. Choices are Optional, Always Mandatory, Mandatory Group.

  Note: If two or more software components are part of a Mandatory Group, then at least one of them must be present so that all the software components are considered a suite. This assumes that the inference percent, inference number, and other requirements are also fulfilled.

When a suite parent is detected during reconciliation, the child components don't count for the individual license.

Note: Users with the model_manager role can navigate to **Product Catalog** > **Product Model** > **Software Models**, but can't administer all aspects of software models.

Software Asset Management supports hybrid and subscription-based software suites. In a hybrid software suite, either the suite parent or child component is subscription-based. In a subscription-based software suite, both the suite parent and child component are subscription-based. The license that you use to determine compliance is dependent on whether the suite parent and child component are subscription-based:

- If only the suite parent is subscription-based, then all the child component installations are inferred as part of the suite parent. You can determine your license compliance using the suite parent license.
- If only the child component of a suite parent is subscription-based, then the instances of that child component aren't inferred as part of the suite parent. You can determine your license compliance using the child component license.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If both the suite parent and child components are subscription-based, then the instances of the child components are inferred as part of the suite parent. You can determine your license compliance using the suite parent license. For example, Microsoft 365 E5 is a subscription-based software suite that consists of the Office 365 E5, EMS E5, and Windows 10 subscription software. Because both the suite parent and child components are subscription-based, they're reconciled against the Microsoft 365 E5 parent license.

Suite inference rules for Adobe license metrics

Based on the system property *`com.snc.sam.auto_suite_inference`*, the Software Asset Management application uses suite or component licenses.

Discovery models and software installations

Software discovery models are automatically created during discovery to identify and normalize the software installed in your environment.

Software discovery models are stored in the Software Discovery Model [cmdb_sam_sw_discovery_model] table. The normalization process is automatically run when a new discovery model is created. Discovery models are not created for software installations that have a name containing `Security Update`.

There is a difference between software models and software discovery models.

- A software model is a specific version or configuration of software that is purchased and/or available to users.
- A software discovery model is a model created when a version of software is discovered in a network environment.

Multiple software discovery models can be associated to one software model. For example, a software model can be defined as follows:

- Publisher = X
- Product = Y
- Version = Starts with 10

If there are two separate installs of this product (version 10.1 and version 10.2), two discovery models are created. One of the discovery models has the discovered version set to 10.1, and the other discovery model has the discovered version set to 10.2. The reconciliation process associates both of these discovery models to the same software model since they both meet the version criterion of `Starts with 10`.

Discovery Models

Software discovery models cannot be created manually. The following field combination, called the primary key, is used to match new software installations to a new or existing software discovery model.

Primary key: **Publisher**, **Display Name**, and **Version**

Note: When analyzing version numbers, an exact match is always searched for first, but rounds down to a major version number when an exact match is not found.

For example, if no match is found for version number 8.0.4, but version 8.0 is found, then version 8.0 is used in the **Software model** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If normalized field values differ from the values in the package or pattern, a caution icon is indicated next to the Normalization status field indicating that a normalization suggestion record has been created. Clicking the caution icon opens the Normalization Suggestion record for that discovery model.

The differing values can be set by the user, or by accepting the normalization suggestion changes. Once a new value is set, the normalization status changes form Normalized to Manually Normalized.

Under specific conditions, certain fields that are typically read-only can be edited. If edited, the status changes to Manually Normalized.

Revert normalization

You can revert a normalization if needed.

When you revert a normalization, discovery models that have a status of **Normalized**, **Partially Normalized**, or **Publisher Normalized** revert to the status of **Match Not Found**. All normalized fields are also reset to their original unnormalized values. You can then normalize your discovery models manually or wait for the next normalization to run automatically. If you are normalizing your discovery models manually, the Software Asset Management application creates normalization suggestions based on the latest normalization rules from the Content Service team. You can choose to accept or reject these suggestions. If you wait for normalization to run automatically, discovery models are normalized using the latest normalization rules from the Content Service team. The discovery models are then set to a status of **Normalized**, **Partially Normalized**, or **Publisher Normalized**, and the normalized field values are set.

Software Installations

The Software Installations list contains the software installed in your organization and is populated by discovery.

Installed software is placed in the Software Installation [cmdb_sam_sw_install] table by Discovery, and a primary key is built (using **Publisher**, **Display Name**, and **Version** fields).

Discovery automatically matches the discovered software installation with a new or existing software discovery model using the primary key.

File Signature Normalization

File-based discovery finds files on UNIX or Windows servers and processes them with an established set of rules that enhance the identification of installed software. Use the results to monitor specific file types on network servers for security purposes or to manage your software licenses with the File Signature Normalization plugin for Software Asset Management - Professional (SAMP).

For more information on the file-based discovery, see the File-based Discovery.

Note: The information provided in this page only covers the features available with the File Signature Normalization (com.snc.file_signature_normalization) plugin.

Required plugins

The File Signature Normalization plugin is required to allow file information to be mapped to installed software. To enable this plugin, Request Software Asset Management.

You can also enable file-based discovery with the File-Based Discovery (com.snc.discovery.file_based_discovery) plugin to filter file signatures. This plugin is included with a Discovery subscription, but you must request plugin activation. Normalization of products and publishers is available for file-based discovery with or without Software Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

How File Signature Normalization works

File Signature Normalization uses discovered files and their attributes, such as file name, file sizes, and version, to find a signature match in the Content Data Service (CDS). Then, File Signature Normalization creates a normalized software installation record.

During regularly scheduled Discovery jobs, the file information is discovered at all the specified end points in a user environment and sent to the MID Server. The information from the MID Server is then sent back to the ServiceNow instance. Information is matched against the content library and the software installation records are created.

If a discovered file name does not match a predefined file signature rule in the CDS, an unidentified file set record is created in the unidentified file set [cmdb_unidentified_file_set] table. Users with the sam_admin role can create a custom file signature rule for the unidentified file set to normalize data manually.

If you opt in to the content service, these custom file signatures are sent back to the CDS for further analysis and inclusion in the content service for future discovery. You can also restrict some custom file signatures from being sent to the CDS by changing the value in the Exclude From CDS column to True.

Note: Software discovery models are stored in the Software Discovery Model [cmdb_sam_sw_discovery_model] table. Unlike pattern discovery normalization, discovery models created by File Signature Normalization do not go through the normalization process automatically and are ignored during scheduled normalization jobs.

File Signature Normalization also identifies duplicates. Software installations that are discovered on the same configuration item, but from different discovery sources, are considered duplicates. All installations that are identified are marked as inactive by default. Once the duplication has been deleted, the remaining installation is marked as active and the discovery model picks up all associated installs.

Note: By default, scheduled jobs are performed during specific times so they do not run heavy loads that could cause performance or stability issues. If these scheduled job times are changed, performance issues could occur.

Any software installs discovered during File-based discovery are updated to reflect any CDS changes in the software install attributes such as product or publisher name change. Stage product and Stage publisher are new columns in the File Set [samp_file_set] table.

File Signature Normalization roles

File Signature Normalization adds the following role.

Roles	Description
file_normalization_admin	Users with this role can access file attribute and unidentified file information. Required to ensure that file signature normalization supports third-party software installation discovery sources.

Tables

File Signature Normalization adds the following tables.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
samp_file_set	File set that maps to a software product. Multiple samp_file_map records can point to one samp_file_set record.
samp_file_map	File map record for each file hash discovered by the end-user device. The file hash is created based on the discovered file and its attributes.
samp_file_name	File names that are used to search on end-user devices.
samp_custom_file_name	File names that entered by the user that can be discovered on end-user devices.
cmdb_unidentified_file_set	Custom rules that are created if a software match is not found for the discovered file in the CDS.

Product life cycles

In the absence of vendor-provided life cycles, there are various capabilities that the Software Asset Management application provides to improve life cycle coverage.

Overview of product life cycles

The Content Library provides approximated life cycle dates and life cycle codes which you can use to drive your life cycle reporting.

You can also use calculated life cycles to create end-of-support (EOS), end- of-extended-support (EOES), and end-of-life (EOL) life cycles for your software products. Additionally, you can create custom life cycles to supplement missing life cycles or overwrite any existing ones from the Content Library.

Software Product Lifecycles table

The Software Product Lifecycles [sam_sw_product_lifecycle] table holds the information of the software product, its lifecycle type (internal or external), full version, lifecycle phases, start date of the phase, and the risk.

The Content active column in the Software Product Lifecycles [sam_sw_product_lifecycle] table is set to the value true by the Software Asset Management content service if the lifecycle records are valid. If you do not want a lifecycle phase to be rendered on the Technology Portfolio Management (TPM) timeline, then set the **Active** column to false. For example, you can have **General Availability**, **End of Extended Support**, and **End of Support** lifecycle phases as three records for Oracle Database software model in the Software Product Lifecycles list. However, if you do not want **General Availability** phase to be shown on the timeline, you can clear the **Active** check box in the Software Product Lifecycle form for that lifecycle phase record. As a result, the timeline starts with the **End of Support** phase. Although the lifecycle phase record exists for the software product lifecycle, the lifecycle data will not be rendered on the timeline. Because only active lifecycle records are considered and plotted in the TPM timeline.

View the Software Product Lifecycle report to be informed about the products nearing end-of-life, end-of-support, and end-of-extended support. View the report by navigating to **Reports** > **View/ Run**. The report is based on the scheduled job, *`SAM - Generate Data For Software Lifecycle Report`*.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Lifecycle Report table

The Software Lifecycle Report [sam_sw_product_lifecycle_report] table calculates the current and upcoming lifecycle phases from the lifecycle phases mentioned in the Software Product Lifecycle [sam_sw_product_lifecyle] table.

For records with the same publisher, product, version, full version, and edition, there's a single record for different lifecycle phases. This helps in avoiding duplicate software installation count for each lifecycle phase. You can export lifecycles from the Software Installation [cmdb_sam_sw_install] table. The software installation records are linked to lifecycles via the *Lifecycle report* column in the Discovery model [cmdb_sam_sw_discovery_model] table.

For better visibility into all life-cycle phases, the following columns have been added to the Software Lifecycle Report [sam_sw_product_lifecycle_report] table:

- Current phase [current_lifecycle_phase]
- Current phase start date [current_lifecycle_phase_start_date]
- Upcoming lifecycle phase [upcoming_lifecycle_phase]
- Upcoming lifecycle phase start date [upcoming_lifecycle_phase_start_date]
- General availability start date [ga_start_date]
- End of support start date [eos_start_date]
- End of extended support start date [eoes_start_date]
- End of life start date [eol_start_date]

Approximated life cycles and life-cycle codes

Approximated life cycles are provided by the Content Library when life cycle dates are not explicitly published by the publisher. The life cycle record may contain an actual date (through various methods of approximation) or an explanation as to why the date could not be provided. This explanation is captured in the Lifecycle codes.

The Software Lifecycle Code [software_lifecycle_code] table, contains all the approximation codes along with a description of each code. For a detailed explanation of life-cycle codes, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB1642485.

A new column, Lifecycle code, is added to the Software Product Lifecycles [sam_sw_product_lifecycle] table. This column refers to the Software Lifecycle Code [software_lifecycle_code] table. If the column is populated, it indicates the record is an approximated lifecycle. If the column is empty, it indicates that the life cycle record has confirmed or explicit dates as published by the publisher.

Approximated life cycles are enabled by default as part of generating the Software Lifecycle Report. This is managed in the system property *com.snc.samp.use_lifecycle_approximation*. For details on this property, see Software Asset Management properties.

Life cycle code columns can also be added to the Software Lifecycle Report for each life cycle phase (GA, EOS, EOES, and EOL). This may require dot-walking the columns from the Software Lifecycle Code table. You should be able to identify which life cycle phase is approximated based on the existence of the codes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Calculated life cycles

To further improve life cycle coverages, even after approximated life cycles have been considered, EOS, EOES, and EOL life-cycle dates can be calculated based on software life cycle averages, measured in months, from the GA dates.

Software life cycle averages can be defined at the product level, publisher level, or industry level. For details on specifying software life cycle averages in the Software Asset Workspace, see Create averages for product life cycles in workspace and for specifying software life cycle averages in the Software Asset Management classic application, see Create averages for product life cycles in Software Asset Management classic

You can override the GA date provided by ServiceNow by creating a custom GA date. The custom GA date always takes priority over the GA date provided by ServiceNow. The life cycles are calculated based on the product or publisher values that you specified. Life cycle dates are defined only at the generic version and not the full version. For details on specifying custom values in the Software Asset Workspace, see Create averages for product life cycles in workspace, and for specifying values in the Software Asset Management classic application, see Create averages for product life cycles in Software Asset Management classic.

Software life cycle averages are stored in the Software Lifecycle Averages [samp_sw_lifecycle_averages] table. Lifecycle records created using these averages have their source column defined as calculated.

Note: Life cycle averages can be created by the sam_user or the sam_admin role.

Calculated life cycles come with the following prerequisites:

- The Software Asset Management Professional (com.sn_samp_master) plugin must be activated.
- GA dates available for the product either provided by the Content Service or custom GA dates that you created.
- EOS, EOES, and EOL life cycles are not provided by the Content Service.
- Product is shipped by the Content Service.
- Life cycle dates are defined only at the generic version and not the full version.

Custom life cycles

Besides approximated life cycles and calculated life cycles, to further improve your life cycle coverage you can also create custom life cycles. Custom life cycles are records that you define at each life cycle phase for the product and version that you selected. You can type in the dates directly in the date fields, and these dates will take priority in the Software Lifecycle Report generation. You can also use this capability to overwrite an existing life cycle record that was provided by the Content Library.

Custom life cycles can be created from either of the two locations on selecting **New**:

- Software Product Lifecycles [sam_sw_product_lifecycle] table.
- Custom Software Product Lifecycle [sam_custom_sw_product_lifecycle] table.

Publisher add-on life cycles

Software publishers offer various add-ons and optional support that can extend the life cycles of their existing products. The Software Asset Management Content Service maintains life-cycle information for both the standard version of each software product and any available add-ons or optional support in the Software Product Lifecycle [sam_sw_product_lifecycle]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

table. To track life cycles more accurately, you can indicate if you have purchased any add-ons or optional support for your software products. The Software Asset Management application then uses the corresponding life-cycle information in the Software Product Lifecycle [sam_sw_product_lifecycle] table to automatically update the life-cycle dates of those products with the extended life-cycle dates of the add-ons or optional support. These updated life-cycle dates are populated in the Software Lifecycle Report [sam_sw_product_lifecycle_report] table. For more information, see Use publisher add-on lifecycles in the Software Lifecycle Report.

Software life-cycle process

The scheduled job *SAM - Generate Software Lifecycle Report* aggregates life cycle data for all normalized software products which have non- zero installation counts. Each record on the Software Lifecycle Report table displays all life cycle phase columns along with their corresponding phase start dates, if the date is available. Life cycle codes can also be displayed to indicate whether the record is an approximated life cycle or not.

The Software Lifecycle Report table also displays the Current Phase and Upcoming Phase columns along with their corresponding dates. For further details about these columns, see Software models and software entitlements.

Another scheduled job, *SAM - Create Calculated Software Lifecycles*, checks for all records on the Software Lifecycle Report table which have GA dates but are missing EOS, EOES, or EOL dates and creates calculated life cycles for them based on the definitions that you have created on Software Lifecycle Averages table.

Keep the following in mind for the scheduled job *SAM - Create Calculated Software Lifecycles* to generate life cycles:

- If domain separation is disabled, enable the *com.snc.samp.generate.calculated.lifecycles* system property in the System Property [sys_properties] table.
- If domain separation is enabled, use the Application Properties [sys_application_properties] table to enable the *com.snc.samp.generate.calculated.lifecycles* property. In the Application Properties [sys_application_properties] table, select the *com.snc.samp.generate.calculated.lifecycles* property to open the Application Properties page. Scroll down to **Application Property Values** and select **New** to create a record. The **Application Property** and **Domain** fields are pre-filled with values. In the **Value** field, enter **true** and select **Submit**. You also need to enable reconciliation by specifying the value of the column *Run asset process [run_asset_process]* to be true in the Domain Asset Process Setting [alm_domain_asset_process_setting] table.

  Note: Reconciliation can be enabled either for the parent domain or for the child domain; it cannot be enabled for both the parent and the child domains.

The calculated life cycles and the life cycles created by you are stored in the Custom Software Product Lifecycle [sam_custom_sw_product_lifecycle] table. Life cycles created by the Content Service are stored in the Software Product Lifecycles [sam_sw_product_lifecycle] table.

If you create custom life cycles, calculated life cycles crated by the scheduled job gets deleted in the next Content Service update, as priority is given to the custom life cycles that you created.

Once created, the EOS, EOES, and EOL life cycles are visible in the software model page.

Note: If a sam_user or sam_admin deletes an EOS, EOES, or EOL life cycle on a software model, the life cycles aren't reinstated back to the software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Downgrade Rights

The concept of downgrading licenses is built into the Software Asset Management plugin feature. Downgrading rights is the process of having acquired the rights to the latest version of software but using the rights to license earlier versions of the same software.

Downgrade rights are added at the software model level.

The Software Asset Management Content Service generates downgrade rights. The downgrade rights correspond to a discovery map. The *Download software content: Downgrade Rights* scheduled job that runs weekly, gets the downgrade rights from the Software Asset Management Content Service and pushes the data to the Downgrade Rights [samp_dmap_downgrade_model] table.

Another scheduled job, *SAM- Create downgrades/upgrades for a software entitlement*, picks up the information from the [samp_dmap_downgrade_model] table. The table propagates the next version and the downgrade rights on the existing software models and their corresponding entitlements.

If there's no software model corresponding to a discovery map, when populating the Downgrade Rights [samp_sw_downgrade_model] table, a new software model is automatically created.

If the discovery map corresponding to the software model has downgrade rights, the Downgrade Rights related list is automatically populated with a hierarchical list of downgraded versions of the software.

Once downgrade rights are created and saved in the Downgrade Rights tables, [samp_sw_downgrade_model] and [samp_downgrade_model], the downgrade rights can't be deleted. However, you can deactivate the downgrade rights.

If you delete a software model, all records corresponding to the software model in the Downgrade Rights [samp_sw_downgrade_model] table are automatically deleted.

Downgrade rights are supported across products for the same publisher, which helps in effectively managing product name changes. When a product is renamed, it's treated as two products. For example, if the product Captivate is renamed to Illustrator, both Captivate and Illustrator are considered distinct products. You can manually add software model downgrade rights from Illustrator to Captivate either in the software model form or in the software entitlement form.

The system doesn't permit creating duplicate downgrade rights; either through the scheduled job or manually in the Software Model and Entitlement form layout. If you try to create duplicate downgrade rights on software models or on entitlements, an error message appears informing you that the downgrade model exists. If they have the same values in all the following fields, downgrade rights are considered to be duplicates.

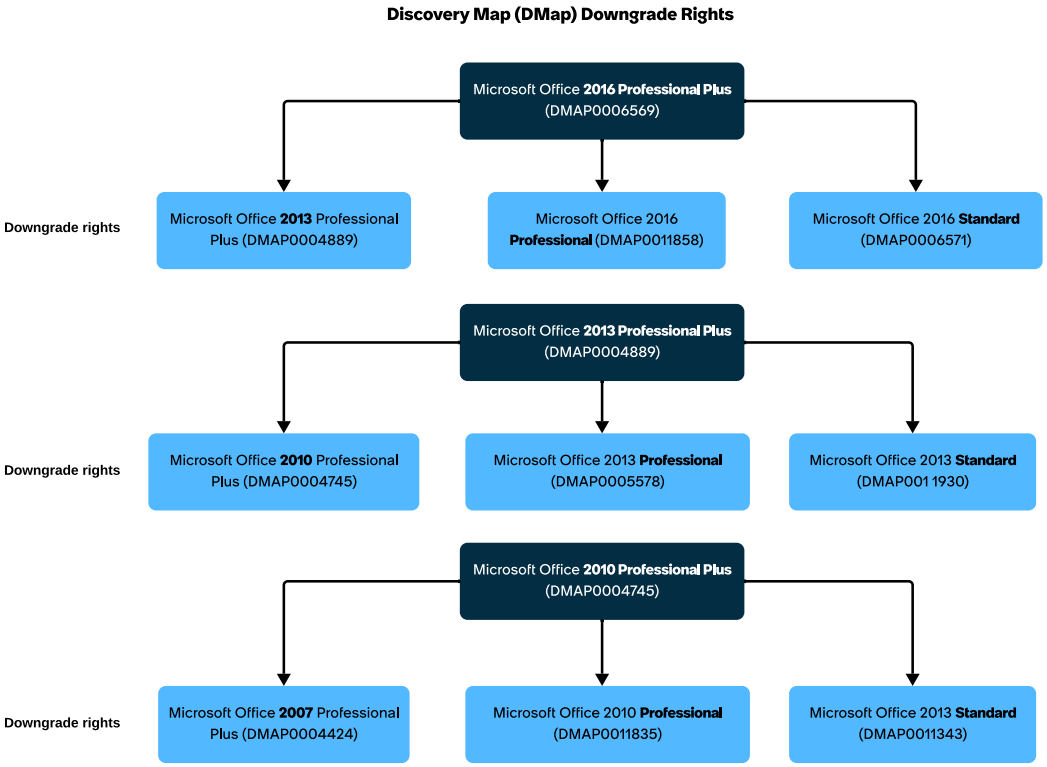
- **Publisher**
- **Product**
- **Version condition**
- **Version**
- **Edition condition**
- **Edition**
- **Platform**
- **Language**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Software install condition**
- **Named User Type**- is displayed only for SAP products.

If you already have duplicate downgrade rights from previous Software Asset Management Professional releases, then those duplicate downgrade rights aren't modified or deleted.

If you try to create a duplicate downgrade right for an inactive downgrade right, an error message appears. The error message informs you that an inactive downgrade right exists and you can reactivate it.



Downgrade rights aren’t available for the following license metrics mentioned in the metric groups:

Note: Downgrade rights aren't supported for the User Subscription license metric regardless of the metric group.

License metrics not supported for downgrade rights

Metric group	License metric
SAP	• Engine Measurement • Named User
Consumption	SaaS Consumption

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License metrics not supported for downgrade rights (continued)

Metric group	License metric
Concurrent Licenses	• Floating • Token • Network

Allocating licenses to a user group

Use the group allocation feature to manage the user allocation to a software entitlement in bulk. This feature enables the SAM managers to streamline and manage the license allocation process efficiently and automatically updates the user allocation when a group composition is changed.

How license allocation to a user group works

The SAM Manager can allocate licenses to a group rather than creating user allocation for individual users for the user-based licensing metric software. When a group allocation is created, the Software Asset Management application creates a user allocation record for each group member based on the availability of the unallocated licenses for the software entitlement. When allocating licenses to the group members, the Software Asset Management application avoids duplication of user allocation. If an assignment group includes a child group and some members belong to both the parent and child groups, only the unique members from the parent and child groups are considered for the license allocation.

Managing license allocation for updated user groups

When a user group is inactivated or updated, the changes are automatically updated for the license allocation to the user. A scheduled job *`SAM- Sync group allocations`* is triggered every week to identify inactive groups, users, and missing allocations before reconciliation. The following scenarios explain how the user group updates are handled by the Software Asset Management application:

- When unallocated licenses are available and you add a member to a user group, the Software Asset Management application automatically creates a user allocation for the software entitlement.
- When unallocated licenses aren't available, the Software Asset Management application doesn’t create a user allocation for the new user. The **Status** field value for the group allocation is updated to show that the user group is partially allocated with a license.
- When a member is removed from a user group, the license allocation to the user is automatically deleted. The **Allocated Quantity** field value is automatically updated to reflect it.
- When a group allocation is deleted from the software model, allocations for all members of that group are removed. The unallocated license quantity is automatically updated.

For more information about creating a group allocation record, see Create group allocations.

Related topics

Create group allocations

Group allocations fields

Software model fields

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software license maintenance

Get visibility into your software maintenance entitlements to effectively manage these licenses throughout their life cycle.

Manage and optimize your software maintenance spend by:

- Importing, updating, and creating maintenance entitlements that specify a start and end date.
- Getting accurate true-up costs.
- Maximizing your resources by getting to know your potential savings.
- Being aware of expiring, unused, and under-used maintenance entitlements.

Determining expiring maintenance entitlements

ServiceNow Software Asset Management Professional helps you keep a track of all expiring maintenance entitlements using the Software Asset Workspace. You can track your entitlements by navigating to **All** > **Software Asset** > **Software Asset Workspace** > **Expiring maintenance and subscriptions**. This tracking ability enables SAM managers to get an overall view of all their expiring maintenance entitlements and take required action.

Maintenance for Microsoft

Microsoft Software Assurance (SA) is the maintenance program that Microsoft uses to provide active maintenance to its users.

Microsoft provides several benefits such as access to the latest software version and releases, cloud special rights, license mobility and many more. For more information on these benefits, see Microsoft documentation.

ServiceNow Software Asset Management Professional leverages these benefits while licensing Microsoft products in the following ways:

- New version rights: With access to the latest version of a Microsoft product, SA users can upgrade their product licenses at zero additional cost. Also, there's no need for tracking or reassigning covered licenses based only on the software version. Software Asset Management Professional adds version support using the following mechanisms:
  - Automatic application of new version: If a software entitlement with active SA is associated with a newer version software model, Software Asset Management Professional automatically upgrades the entitlement and associates it with the latest version software model. Also, these changes are saved on the Upgrade History related list. For more information on software models and versions, see Software model fields.
  - Management of software entitlement: Microsoft supplies publisher part number (PPN) with SA coverage without any version assigned for the product. Thus, there's a risk of incorrect assignment of SA benefits to all versions of Microsoft products. ServiceNow Software Asset Management Professional determines the latest software version released by Microsoft on or before the expiry date of the SA coverage, selects the software model with the correct version, and associates the entitlement to the same. Also, these changes are saved on the Upgrade History Entitlement section.
- License mobility benefits: License Mobility provides the flexibility to manage licensing on premise (in high-density virtualized environments), or on cloud environments (AWS or Azure) using Azure Hybrid Benefits (AHB). For more information on license mobility, see Microsoft documentation.

  Software Asset Management Professional automatically applies the license mobility benefits while licensing deployments of your datacenter products such as Windows Server and SQL Server. The following are some of the benefits that are applied automatically:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Provides options to license by virtual machine (VM) layer: With subscription licenses or licenses with SA, SQL Server 2022 can be licensed by the VM and licenses can move with the VM at any time to another server in the same server farm.
- Supports unlimited virtualization: Enables you to run any number of instances of SQL Server Enterprise Edition software in an unlimited number of VMs if the hosts are completely licensed. This feature is applicable only for the core licensing model.
- Provides AHB and Bring Your Own License (BYOL) support: AHB for SQL Server is a benefit for Azure that enables you to use SQL Server licenses with SA or subscription licenses to pay a reduced rate for only cloud-based computing. For more information on BYOL support, see BYOL support.

If you're covered under Microsoft SA, you can also upgrade, or step-up, a standard version of your software to an enterprise edition. Use the **Upgraded Entitlements** tab of the Software Entitlement form to link related versions of your software under active maintenance and your upgrades.

You can upgrade a Step-up license type entitlement to a Subscription, Perpetual, Perpetual + Software Assurance, or a Step-up license type entitlement. You can upgrade a Subscription Step-up license type entitlement to only an entitlement with a Subscription license type.

Note: Step-up at any time if you have the Microsoft Open Value agreement with Software Assurance.

Step-up license types with no upgraded entitlements could result in inaccurate reconciliation results due to double counting of active rights.

If you have the Microsoft SQL Server Enterprise edition with SA for the Per Core license metric, you can run unlimited virtual machines on the host machine. It doesn't matter how many physical core licenses that you have. For example, let's say that you have a license for running only four physical cores on a host machine. You can then run unlimited virtual machines on the host machine.

If you create a software entitlement at the time of receiving a purchase order and SA is activated on that entitlement, the new entitlement is created with one of the following license types:

- Perpetual + SA: If all previous entitlements have the license type specified as Perpetual + SA.
- Perpetual: If the previous entitlements have a combination of license types set to Perpetual + SA and Perpetual.

You can't use SA entitlements to license your software. SA entitlements aren’t counted during reconciliation. Only perpetual license entitlements are considered.

SA entitlements need a base entitlement, or a perpetual entitlement, to determine license compliance. Thus, when you import entitlements from a Microsoft License Statement (MLS), without a base entitlement, you see an error. For importing entitlements from an MLS, see Importing entitlements from an MLS.

Note: For creating entitlements for Microsoft SA in the Software Asset Workspace, see Create Microsoft Software Assurance entitlements in workspace. For creating entitlements in for Microsoft SA in Software Asset Management classic or for adding SA coverage to an existing entitlement, see Create entitlements for Microsoft Software Assurance in Software Asset Management classic.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Maintenance for publishers other than Microsoft

For all publishers other than Microsoft, you can create maintenance entitlements to support their software license maintenance needs.

You can associate maintenance entitlements with Perpetual, Perpetual + Maintenance, and Upgrade entitlements. Open the maintenance entitlement form layout, select the **Upgraded Entitlements** tab, and select the perpetual entitlement that you want to associate with.

Note: If a maintenance entitlement is associated with a perpetual entitlement, the maintenance entitlement cost is part of the total cost when reconciliation runs.

If you create a software entitlement while you're receiving a purchase order and maintenance is activated on that entitlement, the new entitlement is created with one of the following license types:

- Perpetual + Maintenance: If all previous entitlements have the license type specified as Perpetual + Maintenance.
- Perpetual: If the previous entitlements have a combination of license types that are set to Perpetual + Maintenance and Perpetual.

Note: For creating maintenance entitlements in the Software Asset Workspace, see Create maintenance entitlements in workspace. For creating maintenance entitlements in Software Asset Management classic, see Create maintenance entitlements in Software Asset Management classic.

Related topics

Impact of different license types on software reconciliation

Microsoft Per Core licensing rules

The Per Core licensing model is used by many Microsoft server products, such as SQL Server and BizTalk Server. It's useful when counting users or devices connecting to the software is difficult, often for internet-facing software.

Therefore, the Per Core licensing model is commonly used for enterprise software like Microsoft SQL Server.

The licensing rules for on-premise installations of these products and the cloud installations are separate. The cloud licensing rules follow Bring Your Own License (BYOL). For more information, see Licensing rules for BYOL and BYOS.

To license the on-premise installation of these products using the Per Core licensing model, consider the following two options.

- Licensing by physical cores, also known as licensing by physical hosts
- Licensing by individual virtual machines

Note: You can either allocate to individual hosts or individual virtual machines, not to cluster.

You can either allocate manually, or the Software Asset Management application can automatically select the most cost-effective licensing option based on optimization criteria. The number of core licenses required depends on whether you're licensing the physical server based on its physical cores or licensing individual virtual machines.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information about how to perform allocation, see Allocation management and how the Software Asset Management application performs automated optimization, see View realized and potential cost-based licensing optimizations for Microsoft.

Note: Both options, whether licensing by physical cores or licensing by individual virtual machines, come with their own set of Microsoft rules that must be followed. For more information, see SQL Server.

Other licensing models, such as the Server CAL licensing model, are also available for these products.

Licensing by physical cores

The Software Asset Management application supports licensing by physical core rules, introduced by Microsoft in 2016.

Licensing by physical core rules

Rule	SQL Server Standard	SQL Server Enterprise
Applicability	Not allowed **Note:** Only allowed to be licensed through individual virtual machines.	The number of licenses required equals the number of physical cores on the licensed server. The physical cores on servers are equal to CPU `count` * `Core count`.
Min licenses required	Not allowed **Note:** Only allowed to be licensed through individual virtual machines.	4 licenses per physical processor
Virtualization rights	Not allowed **Note:** Only allowed to be licensed through individual virtual machines.	• Without software assurance or subscription licenses, run virtual machines equal to the number of core licenses assigned to the physical server. **Note:** Each additional virtual machine would require an additional core license. • With active software assurance or subscription license, run an unlimited number of virtual machines if all physical cores on the server are fully licensed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensing by physical core rules (continued)

Rule	SQL Server Standard	SQL Server Enterprise
Failover rights	Not allowed **Note:** Only allowed to be licensed through individual virtual machines.	For each server operating system environment (OSE) licensed with SQL Server subscription licenses covered by active Software Assurance, you can use the following passive replicas ahead of a failover event: • One passive failover replica for High Availability in a separate OSE • One passive failover replica for Disaster Recovery in a separate OSE • One passive failover replica for Disaster Recovery in a single virtual machine or instance on Azure
Components services licensing	Not allowed **Note:** Only allowed to be licensed through individual virtual machines.	The software components of a single SQL Server license can't be separated. An OSE running any of the licensed components of SQL Server requires its own license. For more information about SQL Server components, see Editions and supported features of SQL Server 2022.

When deploying Microsoft products like Windows Server or System Center (using the Per Core license model) on cluster virtualization technologies such as VMware vSphere, Microsoft Hyper-V, or Nutanix Acropolis HyperVisor (AHV), the number of licenses required for the physical host depends on the virtual machines that could potentially migrate to it within the cluster.

Technologies like VMware vMotion, which enables live migration of virtual machines across all hosts, and host affinity, which helps lock virtual machines to hosts within a cluster, manage the movement of virtual machines across hosts. To understand more about cluster virtualization technology and its support on the Software Asset Management application, see Understanding your cluster infrastructure.

According to Microsoft licensing rules, if a virtual machine with a Microsoft product like Windows Server installed is hosted on one server but can potentially migrate to another, the destination server must be licensed as if the virtual machine is already running on it.

Tip: As only the Enterprise edition license can be used for this option and you must license the physical host based on the number of virtual machines that can run on it, this licensing option can be more costly.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensing by virtual machines

The Software Asset Management application supports licensing by individual virtual machines rules, introduced by Microsoft in 2022.

Note: This licensing option is the only option available for SQL Server Standard Edition when using the Per Core licensing model.

Licensing by individual virtual machines rules

Rule	SQL Server Standard and SQL Server Enterprise
Required number of licenses	Equals the number of virtual cores on the virtual machine The virtual cores on servers are equal to `CPU count * Core count * CPU thread count`.
Min licenses required	4 licenses per virtual machine
Software assurance or subscription license **Note:** The option to license by virtual machine is only available with software assurance or a subscription license.	Required
License mobility within Server farms (Software assurance benefit) **Note:** Licenses can be reassigned within the same server farm as often as needed. The 90-day rule applies only when moving to another server farm or cloud provider.	Supported
Component services licensing	The software components of a single SQL Server license can't be separated. An OSE running any of the licensed components of SQL Server requires its own license. For more information about SQL Server components, see Editions and supported features of SQL Server 2022.
Failover rights	For each server OSE licensed with SQL Server subscription licenses or licenses covered by active software assurance, use the following passive replicas ahead of a failover event:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensing by individual virtual machines rules (continued)

Rule	SQL Server Standard and SQL Server Enterprise
	• One passive failover replica for High Availability in a separate OSE • One passive failover replica for Disaster Recovery in a separate OSE • One passive failover replica for Disaster Recovery in a single virtual machine or instance on Azure

Microsoft Per Core (with CAL) licensing rules

The Per Core (with CAL) metric licensing model is followed by various Microsoft Server products such as Windows Server, System Center, and Core Infrastructure Server Suite. The number of licenses depends on the number of installations and operating system environments (OSE).

The licensing rules for on-premise installations of these products and the cloud installations are separate. The cloud licensing rules follow Bring Your Own License (BYOL). For more information, see Licensing rules for BYOL and BYOS.

To license the on-premise installation of these products using the Per Core (with CAL) licensing model, consider the following two options.

- Licensing by physical cores, also known as licensing by physical hosts
- Licensing by individual virtual machines

Note: You can either allocate to individual hosts or individual virtual machines, not to cluster.

You can either allocate manually, or the Software Asset Management application can automatically select the most cost-effective licensing option based on optimization criteria. For more information about how to perform allocation, see Allocation management and how the Software Asset Management application performs automated optimization, see View realized and potential cost-based licensing optimizations for Microsoft.

Note: Both options, whether licensing by physical cores or licensing by individual virtual machines, come with their own set of Microsoft rules that must be followed. For more information, see Windows Server Standard, Datacenter, and Essentials.

Licensing by physical cores

The Software Asset Management application supports licensing by physical core rules, introduced by Microsoft in 2016.

Licensing by physical core rules

Rule	Windows Server Standard	Windows Server Data Center
Required number of licenses	Equals the number of physical cores on the licensed server The physical cores on servers are equal to CPU `count * Core count`.	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensing by physical core rules (continued)

Rule	Windows Server Standard	Windows Server Data Center
Min licenses required	• 8 per physical processor • 16 licenses per server	
CAL requirement	Device or user CALs are required for users or devices accessing the server	
Virtualization rights	Rights to use 2 virtual machines if all cores of the host are licensed with the option for license stacking **Note:** You must license the host again to get rights to use 2 additional virtual machines.	Rights to run unlimited virtual machines when all cores of the host are licensed
License mobility within Server Farms (Software assurance benefit) **Note:** License mobility isn't available for Windows Server. Licenses can be reassigned to servers as often as every 90 days.	Not supported	

When deploying Microsoft products like Windows Server or System Center (using the core with CAL license model) on cluster virtualization technologies such as VMware vSphere, Microsoft Hyper-V, or Nutanix AHV, the number of licenses required for the physical host depends on the virtual machines that could potentially migrate to it within the cluster.

Technologies like VMware vMotion, which enables live migration of virtual machines across all hosts, and host affinity, which helps lock virtual machines to hosts within a cluster, manage the movement of virtual machines across hosts. To understand more about cluster virtualization technology and its support on the Software Asset Management application, see Understanding your cluster infrastructure.

According to Microsoft licensing rules, if a virtual machine with a Microsoft product like Windows Server installed is hosted on one server but can potentially migrate to another, the destination server must be licensed as if the virtual machine is already running on it.

Licensing by virtual machines

The Software Asset Management application supports licensing by individual virtual machines rules, introduced by Microsoft in 2022.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensing by individual virtual machines rules

Rule	Windows Server Standard and Windows Server Data Center
Required number of licenses	Equals the number of virtual cores on the virtual machine The virtual cores on servers are equal to `CPU count * Core count * CPU thread count`.
Min licenses required	8 licenses per virtual machine
Software assurance or subscription license **Note:** The option to license by virtual machine is only available with software assurance or a subscription license.	Required
License mobility within Server farms (Software assurance benefit) **Note:** Licenses can be reassigned within the same server farm as often as needed. The 90-day rule applies only when moving to another server farm or cloud provider.	Supported

Software Asset Management health check

The Health Check ServiceNow Store application gives a correct and reliable overview of your Software Asset Management configurations and recommends you to correct any errors that may exist.

The Health Check application can be used by multiple personas such as implementation partners, SAM managers, and support analysts to determine the health check of their configurations.

Use the Health Check ServiceNow Store application at any point during the deployment of the Software Asset Management application to identify errors. For example, configuration errors such as incorrect setup of entitlements or software models, or missing data attributes found from Discovery. For details on running a health check scan, see Run a health check scan for Software Asset Management.

The current set of checks include checks for the following configurations:

- SQL Server Config
- SQL Server CMDB
- Windows Server CMDB
- Windows Server Config
- Oracle Database

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Java - Oracle
- WebLogic Server - Oracle
- Microsoft 365
- General

The scheduled job, *SAM - Trigger Full Scan*, runs weekly on the KPI categories, shipped as part of the content service, on your ServiceNow instance. The KPI categories can be related to entitlement misconfiguration, downgrade, allocation, or any other configuration issue. You can configure these KPIs or even add more KPI categories. The scheduled job performs an overall health scan to check for any errors that may exist in your Software Asset Management configuration.

Notifications regarding the health checks can be viewed in the Software Asset overview view.

After the health scan is performed, view the results on the Health Check dashboard. View the results in the form of reports that you can download and those reports give recommendations on resolving the issues. For more information, see Health check.

Related topics

Health check

Run a health check scan for Software Asset Management

Reconciliation of licenses across global entities

Share entitlements across different entities within your organization by creating consumption rules for entitlements.

Limit consumption of entitlements to specific set of entities during the reconciliation process. This allows a cost center to purchase licenses and provide it as a service to other cost centers to license software running on their devices without requiring allocations.

Overview of consumption rules

Create consumption rules for entitlements to restrict all entities from using that entitlement. If a consumption rule isn't defined for an entitlement and when the reconciliation process runs, any entity can use that entitlement regardless of who owns that entitlement.

Consumption rules can be created for the following reconciliation groups:

- Company
- Department
- Region
- Cost center
- Country

A single consumption rule can be used across multiple entitlements that helps in reuse of consumption rules.

After you create consumption rules in the License operations view, you must link a consumption rule to one or more entitlements in the **Entitlement Consumption Rules** related list in the entitlement page. After you link a consumption rule to an entitlement, consumption is limited to the users or devices belonging to at least one of the specified entities specified in the consumption rule.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If no active consumption rules exist in the **Entitlement Consumption Rules** related list, anyone in your organization can use the entitlement.

Note: Consumption rules aren't supported for the following license metrics: IBM RVUs, IBM UVUs, and Workday.

Irrespective of grouping, consumption rules apply and licensing is restricted. After you link consumption rules with an entitlement and run the reconciliation process, the following actions take place:

- with grouping: The reconciliation result appears in the form of product results, software model results, and licenses metric results; all generated individually for each group.
- without grouping: The reconciliation result appears in the form of product results, software model results, and license metric results, all under a single heading.

The License Consumption Breakdown [samp_lmr_consumption_result] table reports the allocated and unallocated rights used per license metric results per consumption rule.

Further reporting can be done through the consumption rule column in the Licenses Required By [samp_licenses_required_by] table. The consumption rule column stamps the consumption rule satisfied by that entity.

Use case for consumption rules

Let's say that you've created three separate consumption rules for three departments, namely Sales, HR, and Marketing.

You now link all these three consumption rules to an entitlement, titled ENT A. After you run reconciliation, ENT A can be used by the Sales, HR, and Marketing departments. No allocations need to be created for ENT A.

Parent and child hierarchy

Consumption rules also support parent or child hierarchy for groups. If you have a consumption rule for parent company A, you can choose to include child company B and child company C without creating separate rules.

The *`Create New Consumption Rule`* page in the Enterprise Asset Workspace lets you include the children of the company, department, and cost center in the consumption rule. This reduces the effort required to create individual consumption rules for each entity and to update consumption rules when new entities are added, update, or deleted.

License pools

Consumption rules allow you to define license pools for entities. A license pool is a reservation of rights for a group entity defined on a consumption rule. License pools are specific to an entity per entitlement. If no license pool is defined, the entity can consume rights, but none will be set aside as a guarantee.

For example, an entitlement with 100 available rights can have an HR consumption rule with a license pool of 50. This sets aside 50 rights for HR consumers, and the remaining 50 rights can be used by HR or other entities defined in the consumption rules.

You can view the consumption rules and associated license pools in the **Entitlement Consumption Rules** related list in the entitlement page.

If you don't want license consumption to be limited to entities in the consumption rules, you can use the **Unrestricted consumption** check box on the entitlement page. Once this check

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

box is selected, any entity can consume rights, but the entities in the consumption rules have a reservation of rights set aside.

Note: While both allocations and the **Unrestricted consumption** check box allow other groups to access the entitlement; only allocations provide priority.

Allocations

Allocations take precedence over consumption rules. You don't need to create consumption rules for allocations to work. For example, let's say you have a consumption rule that states that only HR devices can use this entitlement. This entitlement can still include allocations outside of HR such as Sales or Marketing.

Allocations are automatically counted towards license pools when the first applicable consumption rule is satisfied. This is the default setting, but allocations will still be honored even if there is no defined consumption rule or license pool.

Any new allocations that exceed the license pool count will be honored. Any allocations that do not satisfy a consumption rule will also be honored.

Upgrading from Pre Utah releases

If you're upgrading from a Pre Brazil release and based on what you have selected in the *com.snc.samp.recon.group* and *com.snc.samp.recon.subgroup* properties (in the Software Asset Management Properties page), the following upgrade actions take place:

- Grouping: **Company**, **Cost Center**, **Region**, **Department**, or **Country** is selected. A consumption rule is automatically created for the grouping entity selected if the entitlement is in use. For example, if **Department** is selected, and **Company** is selected as the subgroup, then one combined consumption rule is created for both the group, Department and the subgroup, Company. When reconciliation is run, the entitlement usage is restricted to only the Department group and the Company subgroup.

  Note: An entitlement is considered to be in use, if in the Entitlement table, the Install status column has the value 1.

- Non-grouping: **None** is selected. No consumption rule is created as reconciliation runs without grouping. The entitlements can be used by any group.

Software reconciliation for compliance

Automated license reconciliation keeps license positions accurate and up-to-date without manual calculations. Reconciliation runs weekly or on demand.

Overview of reconciliation

Reconciliation is a scheduled job that is run at a specified frequency (default is weekly). It can also be run on demand for specific or all publishers, groups, and subgroups.

Group and subgroup values include country, department, company, region, or cost center. Default group and subgroup properties that apply to the weekly reconciliation run can be set in **Software Asset** > **Administration** > **Properties**.

When reconciliation runs, a list of reconciliation results is created that shows the compliance status of software products concerning discovery and entitlements. Users with the sam_user role can view reconciliation results.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

In addition to creating a purchase order for new software licenses, additional remediation options are available in software model results. Use the results to automatically create and remove allocations, remove unallocated installs, and remove unlicensed installs.

Review reconciliation results in a simplified License Workbench view, and use the License Position report to see compliance details for each software model in a single list.

Upgrade considerations for customized reconciliation script includes

Starting from the Yokohama release, all the reconciliation script includes are being moved from the family release to the Software Asset Management store application (com.sn_itam_samp').

Note: When you activate the Software Asset Management Professional (com.sn_samp_master) plugin or the Software Asset Management Foundation (com.snc.sams) plugin, the Software Asset Management store application (com.sn_itam_samp') is automatically activated.

When upgrading to Yokohama, if you have made customizations to reconciliation script includes, you need to move your customizations to the new script includes. The old script includes will be deprecated.

Software reconciliation results

Software reconciliation results show the compliance status of software products concerning discovery and entitlements. Users with the sam_user role can view the reconciliation results.

When software reconciliation runs, it calculates compliance based on how many rights are in use compared to the number of active rights that have been purchased. Reconciliation runs weekly or on demand for a specific publisher or all publishers. This process generates a list of reconciliation results that display the compliance status of the software in relation to discovery and entitlements. For more details on running software reconciliation, see Run software reconciliation in Software Asset Management classic.

There are three tiers of reconciliation results:

- Product Results
- Software Model Results
- License Metric Results

You can view reconciliation results using both Core UI and Software Asset Workspace.

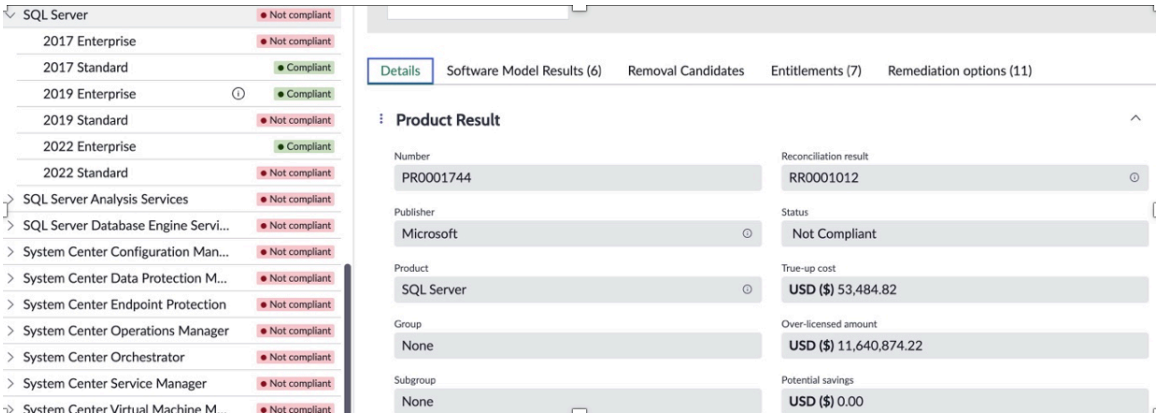
Interface	Action
Core UI	1. Navigate to **All** > **Software Asset** > **Reconciliation** > **Historical Results**. 2. Select a reconciliation result. 3. On the Reconciliation Result form, select a Product Results record to view the product result details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Software Asset Workspace	1. Navigate to **Software Asset Workspace** > **License usage**. 2. Select a publisher card and then select a Product Results record to view the product result details.

Reconciliation results

Product Results

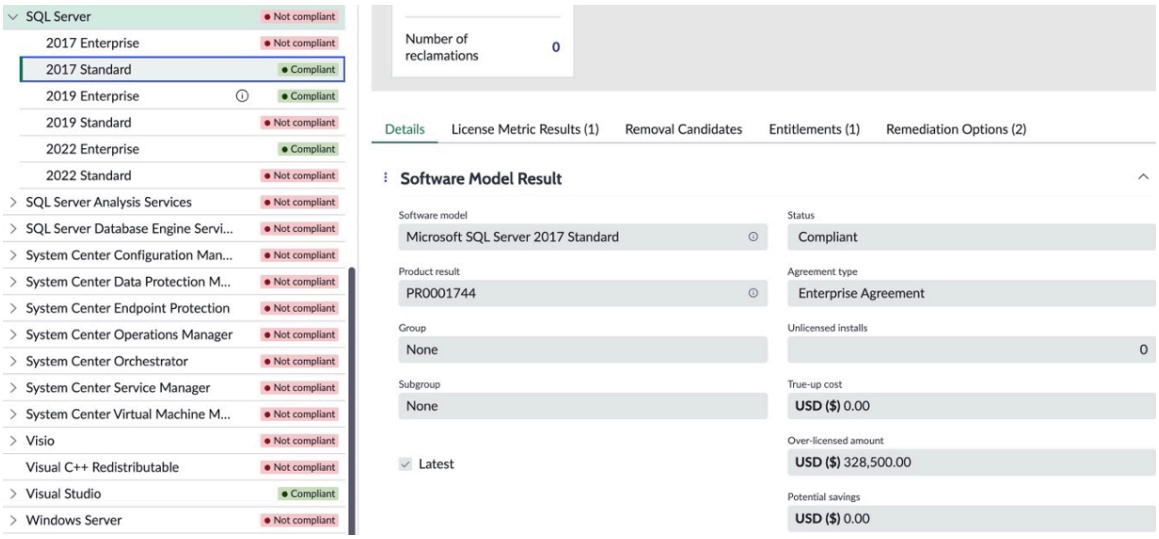


These results are for all models and installations associated with a software product and are specific to a publisher. Product results for licensable products are generated after reconciliation even if the products don't have defined software models for them. These results determine the license compliance status of the product. Additionally, product results provide details on true-up cost, overlicensed amount, and potential savings. The following related lists appear when you select a Product Results record:

- Software Model Results
- Licensed Installs
- Unlicensed Installs (SAP: Unlicensed Users or Unlicensed Engines)
- Unlicensed Subscriptions (Subscription-based software)
- Removal Candidates

Software Model Results

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

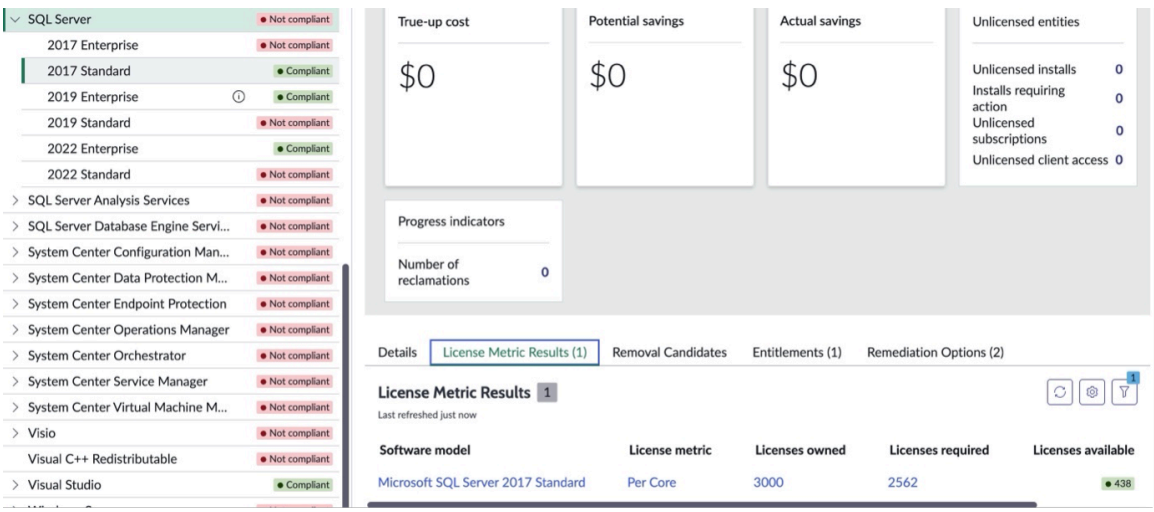


These results are for each individual software model related to the product. The Software Model Results appear as a related list on the product results records after reconciliation is run. A software model results record is created only when a software model or entitlement exists for the software product. The following related lists appear when you select the software model details:

- License Metric Results
- Remediation Options
- Licensed Installs
- Unlicensed Installs (SAP: Unlicensed Users)
- Unlicensed Subscriptions (Subscription-based software)
- Unlicensed Consumptions (Consumption-based software models)
- Unlicensed Options (Oracle only)
- Removal Candidates
- Purchase Orders (only when the Procurement (com.snc.procurement) plugin is active)

For more details on software model results related lists and descriptions, see View software model results.

License Metric Results



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

These results are for each license metric associated with the software model. The License Metric Results appear as a related list on the software model results. License metric result details include rights owned and rights used, and the license allocation breakdown so that you can determine your options to stay compliant. There can be multiple license metric results for a software model because multiple licenses can be purchased for the same software.

From the Software Model Results form, you can drill down on a specific metric result. The following related lists appear when you select license metrics results details:

- Rights Used By (This tab isn't visible for the Resource Value Unit (RVU) IBM license metric.)
- Licensed Installs
- Installs Used (SAP: System Users)
- Downgrades/Upgrades
- Licensed Subscriptions
- Cloud Special Rights (This tab is visible only if you have cloud installations on cloud platforms such as AWS or Azure.)

For more details on license metric results related lists and descriptions, see Software model results license metric results fields.

Effective License Position (ELP) report for grouping by consumption

Get a comprehensive overview of your software license position across various organizational levels by generating an ELP report.

Overview of ELP report

An ELP report groups your data on the latest reconciliation results, and shows the consumption cost by department, cost center, or other groups within your organization, without rerunning the reconciliation process.

The ELP report creates a record every time the report is run for every combination of publisher, product, group, subgroup, version, and edition. For each combination, the report calculates the average cost and totals the number of required licenses. The results are presented in a structured, list view for easy analysis and reporting.

All the ELP data reports you have generated can be found in the ELP Grouping subtab, in the License Usage view.

A grouping result is only deleted if you rerun the reconciliation process with grouping for the same publisher and product.

For details on generating an ELP report, see Generate an Effective License Position (ELP) report.

Use case scenario of an ELP report

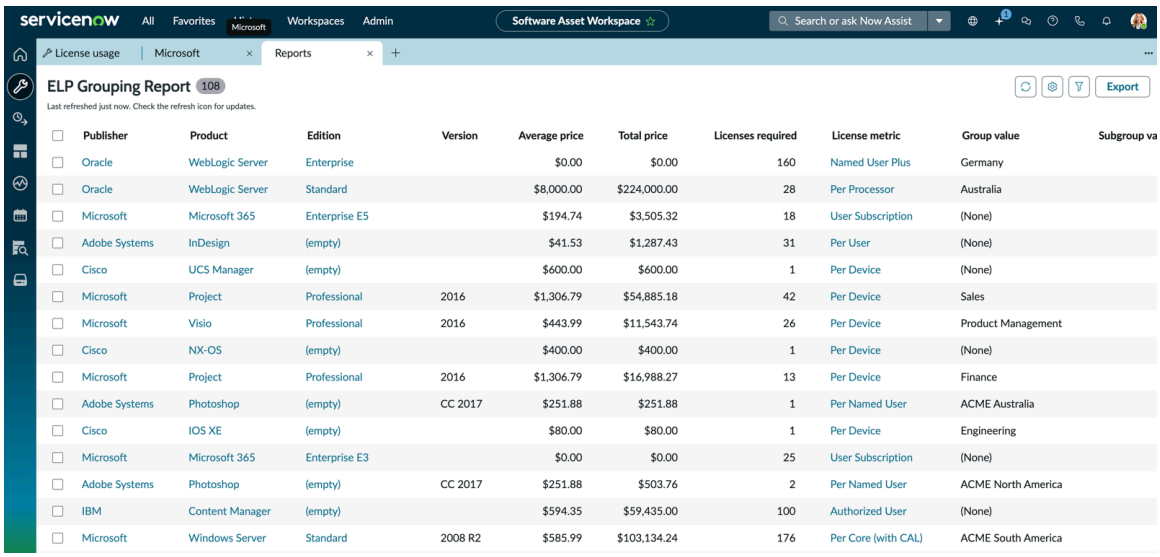
Organization, SampleXYZ, runs the ELP report with the following parameters:

- Publisher: Microsoft
- Product: Office
- Group: Cost Center

Once the report is generated, a record is created for a unique combination of publisher, product, edition, version, license metric, group, and optional subgroup. Open the record to view the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

cost breakdown for each company group along with a detailed breakdown of the costs for each license metric, edition, and version of software models.



Publisher	Product	Edition	Version	Average price	Total price	Licenses required	License metric	Group value	Subgroup va
Oracle	WebLogic Server	Enterprise		$0.00	$0.00	160	Named User Plus	Germany	
Oracle	WebLogic Server	Standard		$8,000.00	$224,000.00	28	Per Processor	Australia	
Microsoft	Microsoft 365	Enterprise E5		$194.74	$3,505.32	18	User Subscription	(None)	
Adobe Systems	InDesign	(empty)		$41.53	$1,287.43	31	Per User	(None)	
Cisco	UCS Manager	(empty)		$600.00	$600.00	1	Per Device	(None)	
Microsoft	Project	Professional	2016	$1,306.79	$54,885.18	42	Per Device	Sales	
Microsoft	Visio	Professional	2016	$443.99	$11,543.74	26	Per Device	Product Management	
Cisco	NX-OS	(empty)		$400.00	$400.00	1	Per Device	(None)	
Microsoft	Project	Professional	2016	$1,306.79	$16,988.27	13	Per Device	Finance	
Adobe Systems	Photoshop	(empty)	CC 2017	$251.88	$251.88	1	Per Named User	ACME Australia	
Cisco	IOS XE	(empty)		$80.00	$80.00	1	Per Device	Engineering	
Microsoft	Microsoft 365	Enterprise E3		$0.00	$0.00	25	User Subscription	(None)	
Adobe Systems	Photoshop	(empty)	CC 2017	$251.88	$503.76	2	Per Named User	ACME North America	
IBM	Content Manager	(empty)		$594.35	$59,435.00	100	Authorized User	(None)	
Microsoft	Windows Server	Standard	2008 R2	$585.99	$103,134.24	176	Per Core (with CAL)	ACME South America	

Accurately reporting your software true-up cost

Accurately report your software true-up costs to avoid compliance issues.

Specify the license cost or the license plus maintenance cost in the software model to accurately report the true-up costs during reconciliation. If you don't specify a license cost or a license plus maintenance cost, the average software entitlement cost is used for true-up cost calculations.

Note: For the Employee license metric in the Oracle publisher pack, the true-up cost is shown for a subscription period of one year.

If you use a license metric to create a software entitlement for a software model, an override license cost record is created if one already doesn't exist for the same license metric. The license cost record is added in the Override License Cost related list. The license cost and license plus maintenance cost is set to zero. If a maintenance license exists, you can override the license cost or the license plus maintenance cost. For details, see Create or update an override license cost record.

Software license compliance position

The Software Asset Management License Position report shows compliance details for each software model in a single list.

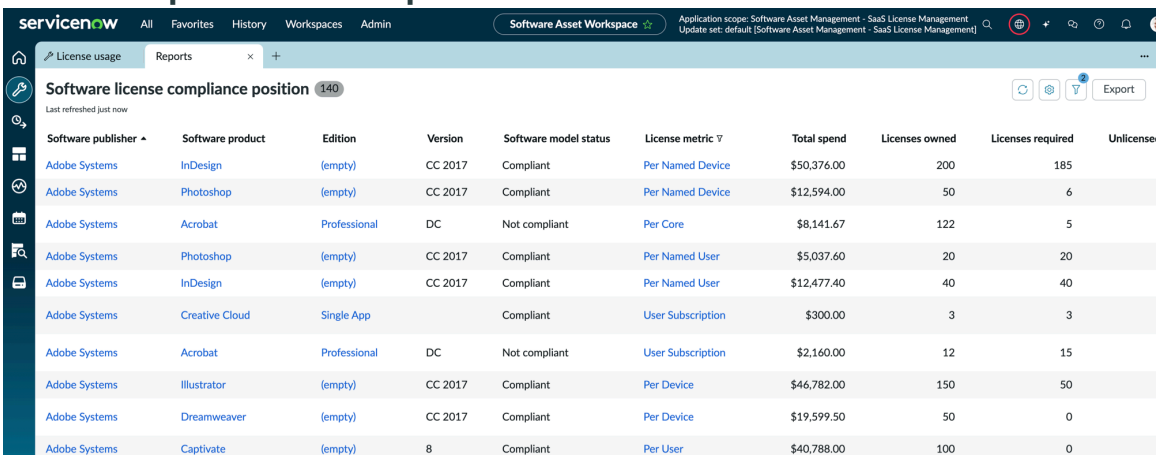
You can view and export the software model compliance list for your environment to understand your license position.

Two license metric results are generated if a software model has two entitlements, one with a perpetual SA license type and the other with a subscription license type. One license metric result where active maintenance is true and the other where the active maintenance is false. In such a scenario, two license position reports are generated, one with active maintenance true and the other one with active maintenance false.

A single license position report is generated if there are any unlicensed installations. A single license position report is also generated if there are any unlicensed subscriptions. If both are present, two license position reports are generated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License Compliance Position report



License Position Report list

Field	Description
Software publisher	Software publisher of the software model.
Software product	Software product of the software model.
Edition	Edition of the software product.
Version	Version of the software product.
Software model status	Compliance status of the software model. • Compliant (indicated with a green dot) • Not Compliant (indicated with a red dot)
License metric	License metric of the software model.
Total spend	Total cost of rights owned.
Rights owned	Sum of all active rights.
Rights used	Sum of rights allocated in use and not allocated in use.
Rights needed	Rights needed to cover the number of unlicensed installs.
Rights available	Rights owned less rights used.
Unlicensed installs	Number of unlicensed software installations that are not covered by any entitlements.
True-up cost	Estimated cost of remediating non-compliance based on the least number of rights needed.
Potential savings	Estimated savings from reclaiming unused installs.
Over-licensed amount	Total cost of unused rights.
Software model	Software model name.

The License Position Report form also contains **Group** and **Subgroup** fields that specify the group and subgroup on which reconciliation was run.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Determining license compliance through Virtualization Adapter

Software Asset Management Virtualization Adapter determines the license compliance of several software products deployed on virtualization technologies by applying license compliance rules. This feature is activated and installed with the base system in Software Asset Management.

The following are the software products for which Software Asset Management Virtualization Adapter determines the license compliance:

- Microsoft SQL Server
- Windows Server
- Red Hat Enterprise Linux Server (RHEL)
- Oracle Database, Options, and WebLogic Server

Virtualization is a process of simulating hardware functionality and creating a virtual environment in which you can run more than one virtual machine on a single server in a clustered environment. For more information on Oracle Database and WebLogic Server licensing support on VMware vSphere and Nutanix virtualization technology, see Oracle Database and WebLogic Server licensing in soft-partitioned environments.

The virtualization technologies supported by Software Asset Management are:

- VMware
- Microsoft Hyper-V
- Red Hat Virtualization
- Nutanix

ITOM Discovery discovers virtualization technologies based on their relationship architecture. Software Asset Management depends on the discovered relationships to determine the license compliance of the software installations.

Software Asset Management Virtualization Adapter standardizes the relationship architecture through database views and metadata views, which are used by Software Asset Management to determine license compliance.

Software Asset Management considers the architecture of the virtualization technology while applying the licensing rules. For example, Microsoft Hyper-V architecture permits Windows Server Standard edition to use one running instance of the server software in the physical OSE on the licensed server in addition to two virtual OSEs if the physical OSE is used only to host and manage the virtual OSEs. Software Asset Management Virtualization Adapter automatically applies this rule set.

Explanation of license rights post reconciliation

Get visibility into how your rights are calculated and consumed post the reconciliation process.

Overview of explanation of rights

Understand how the Software Asset Management application calculates the number of licenses for your software assets.

A detailed explanation of license rights is provided for the following metric groups:

- Microsoft
- IBM

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Red Hat
- VMware
- Oracle
- SAP
- Citrix
- Common

For details on viewing the explanation of license rights, see View calculations for your licenses in workspace

Tier-based license metric calculation

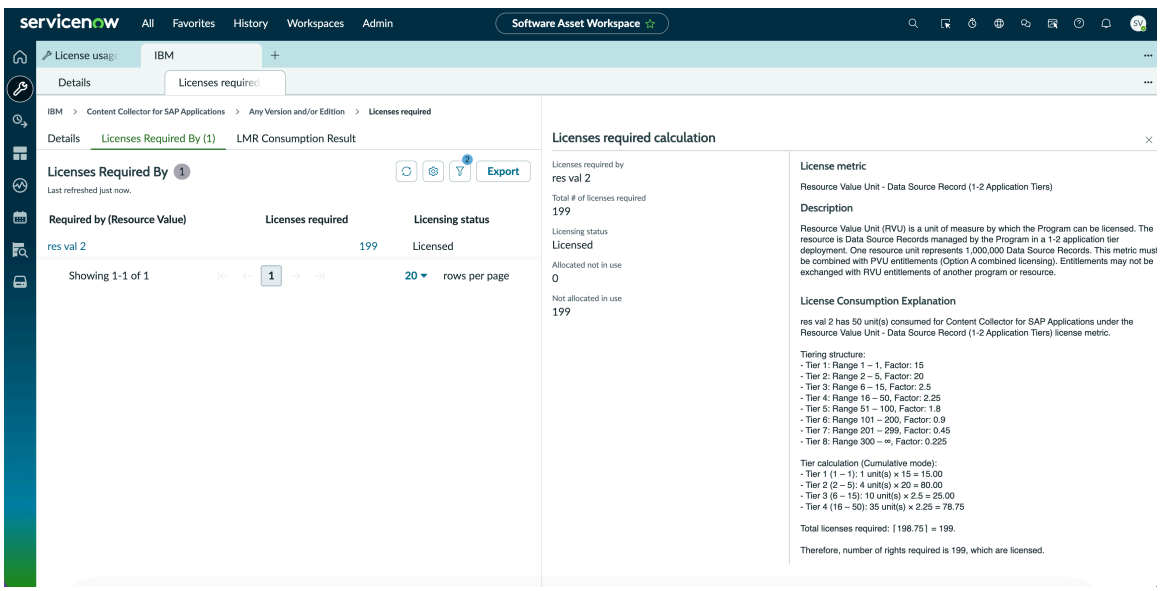
For a tier-based license metric, the consumed quantity is distributed across defined ranges or tiers. Each tier applies its own factor to the units that fall within that tier, and the results are added together to determine the total number of licenses required. The total is then rounded up to the next whole number.

The following example shows how license rights for a tier-based license metric appear on the Licenses Required by page:

The resource value **res val 2** has 50 units consumed for Content Collector for SAP Applications under the Resource Value Unit - Data Source Record (1-2 Application Tiers) license metric. The tiering structure for this license metric defines a factor for each range:

- Tier 1: Range 1–1, Factor 15
- Tier 2: Range 2–5, Factor 20
- Tier 3: Range 6–15, Factor 2.5
- Tier 4: Range 16–50, Factor 2.25

The factor for each tier applies only to the units within that tier. The application calculates each tier and adds the results: tier 1 (1 unit × 15 = 15.00), tier 2 (4 units × 20 = 80.00), tier 3 (10 units × 2.5 = 25.00), and tier 4 (35 units × 2.25 = 78.75). The sum is 198.75, which is rounded up to 199. Based on the tier-based calculation, res val 2 requires 199 rights, which are licensed.



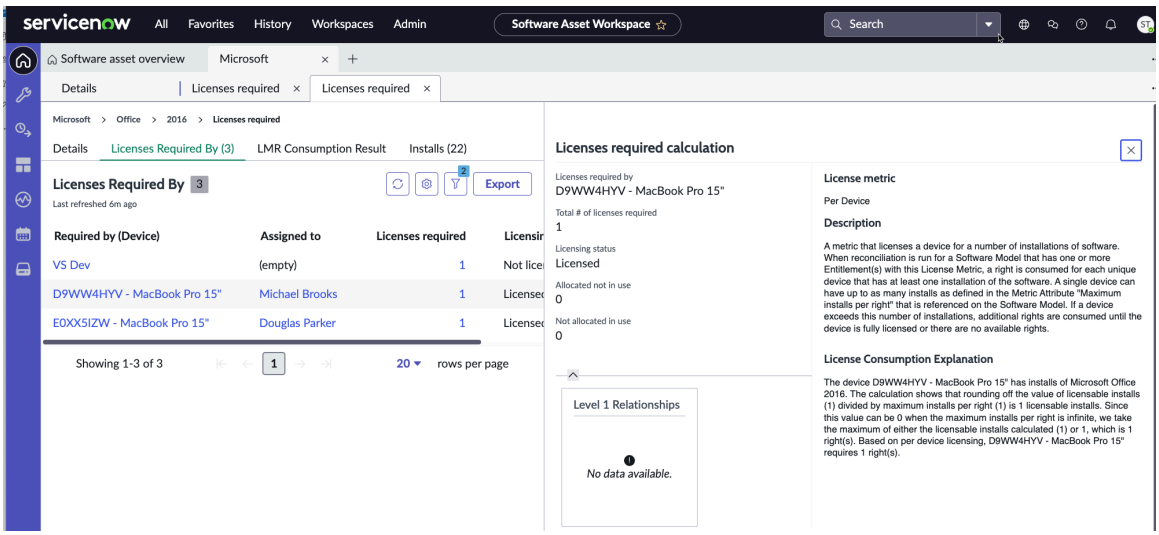
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If multiple resource value records contribute to the calculated requirement, the **Licenses Required By** tab does not show a tier-by-tier breakdown. To understand the calculation, review the individual resource value records.

Calculation for Per Device license metric

The following is an example of how an explanation of license rights for a Per Device license metric appears on the Licenses Required by page:

- The MacBook Air 15" device has installations of Microsoft Office 2016.
- License consumption explanation: The device D9WW4HYV - MacBook Pro 15" has installs of Microsoft Office 2016. The calculation shows that rounding off the value of licensable installs (1) divided by maximum installs per right (1) is one licensable install. Since this value can be 0 when the maximum installs per right is infinite, we take the maximum of either the licensable installs calculated (1) or 1, which is 1 right. Based on per device licensing, D9WW4HYV - MacBook Pro 15" requires 1 right.



Software reclamation rules

Reclamation rules aggregate usage over time. These rule also specify a minimum number of hours or the latest date that a software unit must be used before the software is flagged for reclamation.

Overview of software reclamation rules

You can avoid purchasing more software rights for products by knowing which rights have already been allocated but are being used infrequently, haven't been used recently enough, or aren't being used at all. Reclamation rules reclaim those software rights so that these rights can be freed up and allocated elsewhere. Reclamation rules are configured to specify a period of time, amount of time, or most recent date that a software unit must be used before the software is flagged for reclamation.

When a reclamation rule is created for a suite parent, the usage for the suite parent and the suite components are automatically pulled into the rule.

When you create a reclamation rule, you can add software products associated to the reclamation rule. When you add a product, which is a suite parent, all the suite components automatically get added and appear in the Software Products related list in the Reclamation rule form. Similarly, the product processes for all the added software suite products and component products also get added and appear in the Product Processes related list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The products in the Software Products related list are updated based on the content updates in the Software Asset Management Content Service. For example, if a suite component has been added or removed from a suite parent, the change is reflected in the Software Products related list.

After a suite parent is added to a reclamation rule, you can't edit or delete any suite components, but you can edit or delete the suite parent. If you delete the suite parent, the suite components are also automatically deleted along with the product processes. If you edit a suite parent, then the changes of the edit are reflected for the suite components and the associated product processes. For example, if you change the suite parent from Microsoft Office 365 to Microsoft Word, all the suite components and product processes for Microsoft Office 365 get deleted. Microsoft Word becomes the new parent and all suite components and product processes for Microsoft Word are automatically added.

Filter conditions

You can add a filter condition on a suite parent record. The filter condition that you specify for a suite parent is automatically applied to all the suite components of the parent and the filter condition field on the suite component record is no longer editable. You can, however, edit the filter condition on the suite parent record. You can open a suite parent record from the Software Products related list and specify your filter condition in the record.

You can also specify a filter condition at the reclamation rule level. The filter condition that you specify applies to all the products that belong to the reclamation rule. The filter condition can only be applied when the **Applies to** field in the Reclamation rule form has the value **Installed Software** or **Subscription Software**. For details, see Add a software reclamation rule.

Reclamation rules for SaaS and SSO applications

When you create a direct integration profile for a SaaS application or connect an SSO application, a reclamation rule is automatically created for the software product. It's important that you review the reclamation rule to verify that it meets your specifications. For more information, see Review a software reclamation rule.

For more information about the reclamation rules for each application, see Reclamation rules for SaaS and SSO applications.

Upgrading to Brazil

If you’re upgrading to Brazil from any past release, your existing reclamation rules don't automatically take bulk reclamation into account. You must manually set up your existing reclamation rules for bulk reclamation to take effect. For example, in an existing reclamation rule, you have Microsoft Office 365 listed in the Software Installations related list. When you upgrade to Brazil, you must delete Microsoft Office 365 from the Software Product related list and re-add it to the same reclamation rule to trigger the automatic addition of suite components and their product processes.

Microsoft SCCM software usage

Activate the Microsoft SCCM software usage plugin to integrate your software usage data with the ServiceNow AI Platform.

One of the following Microsoft SCCM Software Usage plugins must be installed to import software usage data from Microsoft SCCM to Software Asset Management.

- Integration — Microsoft SCCM 2012 v2 Software Usage (com.snc.samp_usage_sccm) plugin
- Integration — Microsoft SCCM 2016 Software Usage (com.snc.samp.usage_sccm_2016) plugin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Integration — Microsoft SCCM 2016 plugin is compatible with SCCM version 1606, 1906, 1910, and 2002.

Important: Both Microsoft SCCM plugins will be deprecated in the Tokyo release. If you are integrating with SCCM for the first time, request and install the Service Graph connector for Microsoft SCCM application from theServiceNow Store instead. If you have already activated one of the Microsoft SCCM plugins on your ServiceNow instance, use the Migration Readiness Tool for Service Graph Connector for SCCM store application to prepare your instance for migration from the Microsoft SCCM plugin to the Service Graph connector. See Service Graph connector for Microsoft SCCM for more information on the Service Graph connector.

The SCCM integration plugin installs several components.

After the SCCM usage plugin is activated and configured, a scheduled import runs monthly to bring SCCM software usage data into your instance. The usage data is then mapped to Software Usage table. During the scheduled job, a SQL query is executed.

The scheduled import runs once a month, but you can run the import on demand by clearing the **Conditional** option on the Scheduled Data Import form. However, the data is always pulled from the previous month, so there won't be a change in the data until the following scheduled import.

Note: The SCCM software usage data source can't be executed directly because the SQL statement doesn't actually pull in the data, so the records aren't retrieved. A valid SQL statement on the data source is updated dynamically though a scheduled import. So, if you need to pull the data into your ServiceNow instance, use the scheduled import.

There are two types of data (total usage and last used) that you can extract from SCCM and import into your instance. Last used data will only show the last time the software was used during the previous month.

Total usage data will show down to the second when the software was used in the previous month, which can be a large amount of data imported into your instance. A usage record tracks the sum of usage on a monthly basis so that you can assess the software usage in your environment.

Depending on what you've specified in the reclamation rule for the product, one of the following scheduled imports will run to pull in the data.

- SAMP Usage Import
- SAMP Usage 2016 Import
- SCCM 2012 v2 Software Last Used
- SCCM 2016 Software Last Used

Note: Only usage data for products associated with a reclamation rule is imported. The **Reclamation type** field on the Reclamation Rule form must match the scheduled import that you are running, otherwise the data is not pulled into your instance. For more information, see Create a reclamation rule to import Microsoft SCCM usage data.

You can also pull in user data from SCCM. User data is compared to the user_name field of the sys_user record. If the names don't match, the user data isn't imported.

Note: Configuration item (CI), user, product, and publisher values are used to identify a matching software installation.

Duplicate usage information cannot be created for the same CI, user, product, or publisher values in the same month and year.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can also import usage information using ServiceNow import sets feature.

Software installation optimization and removal

You can optimize your environment by reclaiming unused software as well as removing unauthorized software.

If a user is not using an installed software, or using infrequently, that software can be a candidate for removal. Removal means uninstalling and reallocating the software to an individual who uses it more often. Removal candidates are used to reclaim software installations.

Overview of software reclamation

Software reclamation is integrated with Workflow and Client Software Distribution (CSD) to automate the process of uninstalling software from devices and reclaiming those software rights. During the workflow, the state of the removal candidate changes based on the progression within the workflow.

Note: If you change a software asset's state to **Retired** or **Missing**, the installation associated to the software asset gets removed and a removal candidate won't be created.

Starting from the Zurich release, the reclamation workflow can also be completed using the Software Reclamation Flow in the Flow Designer application with additional error handling features.

Reclamation can be performed for suite based products and for individual products that aren't part of a suite.

- For suite based products, bulk reclamation is performed at the user level. One removal candidate is created for reclaiming the suite. You can add the suite components to the same removal candidate via the Software Installation related list on the removal candidate form. The potential savings displayed is for the entire suite. Suite components can't be reclaimed individually. In the Software Asset Workspace, you can add the suite components to the removal candidate one at a time. In the Software Asset Management classic framework, you can add the suite components all at one go.
- For individual products, you can specify the software installation that you want to reclaim.

There are multiple ways that removal candidates get created. A monthly scheduled job, *SAM – Identify new reclamation candidates*, uses the reclamation rules and software usage to create removal candidates. Additionally, removal candidates are also created as part of using remediation options for unlicensed and unallocated software installations, and for restricted software. When a software model is marked as restricted, removal candidates are created for any software associated to that software model. The reclamation flow and process is the same in all these use cases.

The *SAM – Identify new reclamation candidates* scheduled job creates removal candidates and these removal candidates automatically have the bulk reclamation flag checked. The removal candidates created are based on the results from the reconciliation process. Verify that at least one reconciliation process has run with successful results before running the *SAM – Identify new reclamation candidates* scheduled job. This ensures that the *SAM – Identify new reclamation candidates* scheduled job accurately creates removal candidates to identify the right potential savings.

In each list of Removal Candidates, you can select individual records for reclamation (**Reclaim**) or **Reclaim All** to reclaim all qualifying removal candidates. Qualifying candidates are those candidates that are in the Ready state. After you select **Reclaim** or **Reclaim All**, the process to remove the software is initiated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Upgrading to Brazil

After upgrading to Brazil, if you have an existing removal candidate in the**Awaiting revocation** state, nothing will be done with that removal candidate. If that removal candidate was part of a suite, then removal candidates are created for each of the other software installations in that suite. However, if the state of the existing removal candidates is anything other than **Awaiting revocation**, then those removal candidates are canceled and a single removal candidate gets created for all the software installations that are part of that suite. In the **Activity** section on the removal candidate form, a reason is mentioned for the closure of each removal candidate.

Removal candidate grouping

Removal candidates are grouped according to justification.

- Low Usage
- Restricted Software
- All other justifications (such as Unlicensed, Unallocated)

Removal candidate state

State	Description
Attention Required	A removal candidate requires attention if the **User** field is empty on an automatic removal candidate that has the **Notify User** check box selected. Once the **User** field is populated, the state automatically changes to Ready.
Ready	When a removal candidate is in the Ready state, you can select **Reclaim** to advance the workflow.
Awaiting User	If the **Notify User** check box was selected, the user was sent a notification of the removal candidate to approve or deny.
Awaiting Approval	If the **Notify User** check box was selected, the user can approve or deny the removal candidate. If the user still wants to keep the software installation, it becomes the responsibility of the manager to approve or decline the removal.
Awaiting Revocation	The final step in the workflow. You can select **Close Complete** to reclaim software rights in the removal candidate manually. Otherwise, a weekly scheduled job (named SAM — Updating Existing Reclamation Candidates) automatically updates removal candidates in the **Awaiting Revocation** state and with the software install field empty to **Closed Complete** state. If the removal candidate is in any other state AND the software install is empty,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Removal candidate state (continued)

State	Description
	the Reclamation workflow is canceled and updated to **Closed Skipped** state. The state for a removal candidate that has restricted software is automatically set to **Awaiting Revocation** and the justification is set to **Restricted Software**.
Closed Complete	Software rights have been reclaimed.
Closed Skipped	Software rights not reclaimed by the removal candidate.
Closed Canceled	Software rights not reclaimed by the removal candidate as user activity is detected.

Restricted software justification and unlicensed justification

Workflows for removal candidates with a restricted software justification or an unlicensed justification get executed automatically. The user is notified of unauthorized software use and isn't prompted for approval.

- Restricted Software:

```
Unauthorized Software Use

[Publisher] [Product] installed on the device, [device name], is
not authorized to be used on company property. Do not install
this software again.
```

- Unlicensed:

```
Unauthorized Software Use

You are not licensed to use [Publisher] [Product] installed
on the device, [device name]. Use the appropriate process to
request a license for the software.
```

The workflow state for a Restricted software justification and an unlicensed justification is then set to **Awaiting Revocation**. After discovery identifies that the installation no longer exists, the state is changed to **Closed Complete**.

Unallocated justification and Low Usage justification

Workflows for removal candidates with an unallocated justification or a low usage justification prompt the user for approval.

- Unallocated:

```
[Publisher] [Product] installed on the device, [device name],
has been flagged for removal because an allocation to use the
software does not exist. Do you still require access to this
software?
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Low Usage:

```
[Publisher] [Product] has been flagged for reclamation. Do you
still need this software installed on [device name]?
```

Justification descriptions

Removal candidate descriptions get updated based on the justification.

- Unallocated:

```
[Publisher] [Product] installed on the device, [device name],
has been flagged for removal because an allocation to use the
software does not exist. If you do not require this software,
Reject this task. If you still require access to this software,
Approve this task and your request for continued use of the
software will be routed for software manager approval.
```

- Unlicensed:

```
[Publisher] [Product] installed on the device, [device name],
has been flagged for removal because the licenses to use it are
not owned. Please request access to this software through the
appropriate process.
```

- Restricted Software:

```
[Publisher] [Product] installed on the device, [device name], is
not authorized for use on company owned property.
```

- Low Usage:

```
[Publisher] [Product] installed on the device, [device name],
has been flagged for reclamation due to low usage. If you do not
require this software, Reject this task. If you still require
access to this software, Approve this task and your request
for continued use of the software will be routed for manager
approval.
```

When the **Reclaim** action is selected, if the **Notify User** field is true and the days before reclamation is greater than 0, then the state is set to **Awaiting User**. Otherwise the state is set to **Awaiting Reclamation**.

When the state changes to **Awaiting User**, a notification is sent to the user.

Related topics

View or create software usage

Reclaim software

Allocation management on Software Asset Management

Software Asset Management (SAM) offers optimal license assignment confirming that licensing entities are allocated according to the available entitlements.

For example, Software Asset Management determines the most cost-effective license assignment for a specific host or virtual machine based on the available Microsoft SQL Server Standard or Enterprise entitlements. Software Asset Management streamlines the licensing process and helps you optimize costs by selecting the most efficient licensing

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

options. Allocation management saves your time, reduces the risk of compliance issues, and unnecessary expenses.

License allocations enable you to prioritize license assignments for specific hosts, virtual machines, users, devices, and more, according to the licensing strategy of your organization. You can override the default license assignment so that your unique needs are met.

There are several ways to manage allocations and here are a few scenarios to help you use allocation management effectively.

- Using allocation to license entities with other licenses

  License a device or user with a different license than the one assigned by Software Asset Management for a flexible license management process.

- Locking license assignment by creating allocations

  Lock a license assignment for the same license consumption to occur every time the reconciliation runs to maintain consistency and avoid unexpected changes.

- Removing unnecessary allocations

  Remove unnecessary allocations when they’re no longer needed for an efficient license management process.

- Copying allocations

  SAM Managers can copy allocations from one entitlement to another which helps to apply the same allocation strategy across multiple entitlements, saving time and maintaining consistency.

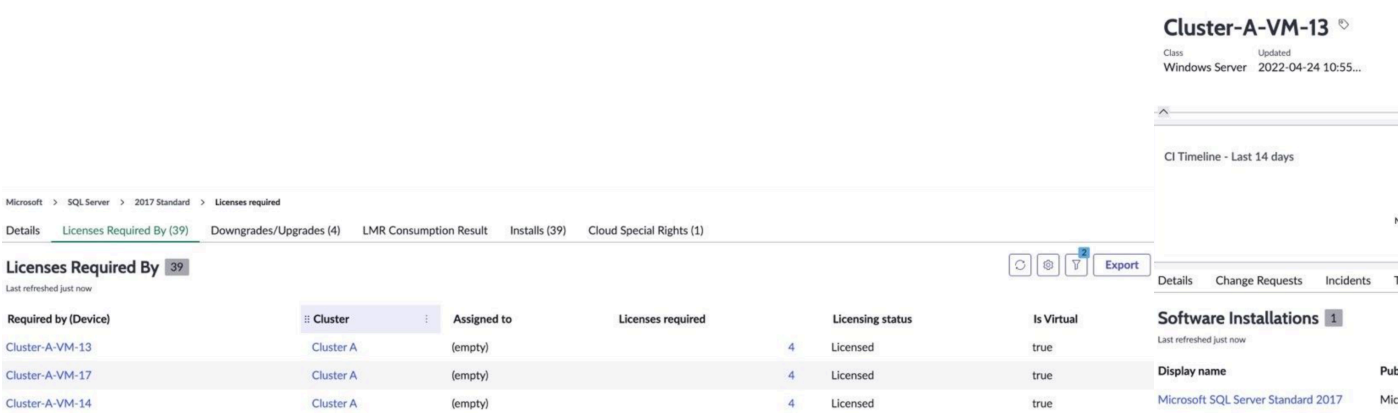
- Overriding license assignment

  Override Software Asset Management license assignment and allocate the license to the Host or the Virtual Machine (VM) in a Hypervisor Cluster.

Example: Licensing entities with other licenses

Software Asset Management automatically licenses entities such as a virtual machine with Microsoft SQL Server Microsoft Standard license based on cost effectiveness. But the SAM Manager wants to change the license assignment to SQL Server Enterprise according to the licensing strategy of the organization.

SAM Manager analyzes the license consumption of a particular entity, Cluster A- VM 13, and verifies that it has been consumed by SQL Server Standard and the software installed on this virtual machine is also SQL server Standard.

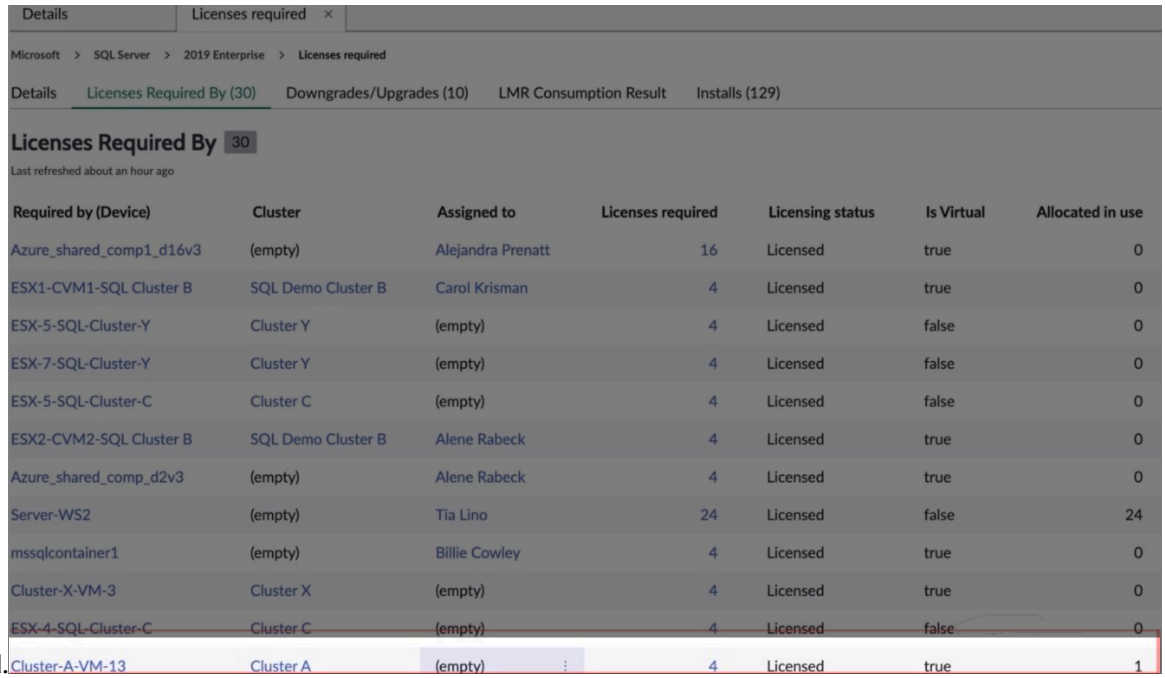


© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

But according to the licensing strategy of the organization, SAM Manager wants to assign the SQL Server Enterprise license to this entity. In this scenario, the SAM Manager or SAM Admin can add an allocation to the SQL Server Enterprise entitlement, which would allocate SQL Server Enterprise licenses to the entity.

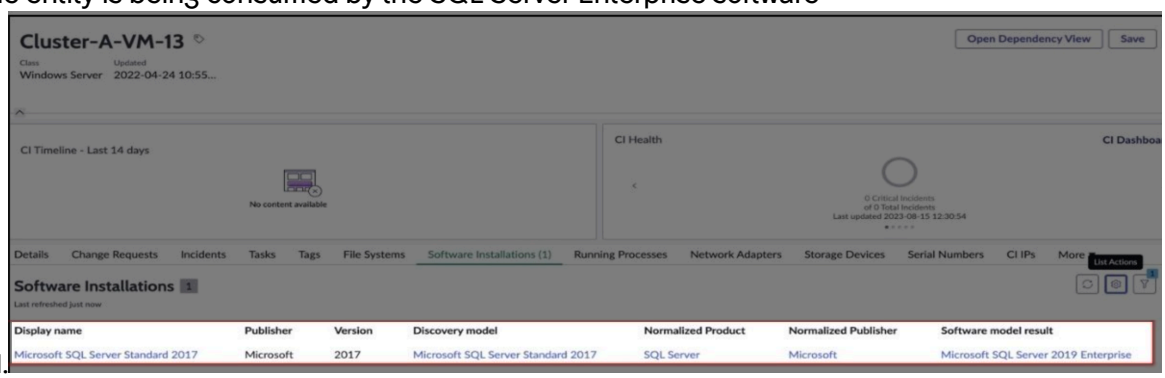
Note: You don't have to remember the quantity of licenses to allocate. Software Asset Management automatically determines the licenses required for the entity, so the SAM Manager or SAM Admin can allocate a license.

After reconciliation, Cluster A- VM 13 has consumed licenses from SQL Server Enterprise. Four rights have been consumed wherein only 1 was allocated. You can also verify that the **Allocated in use** field to confirm that the added allocations are consumed.



For more information about the allocation fields, see Software model results license metric results fields.

In the Cluster A- VM 13 Software installation list, the installed software is SQL Server Standard. However, the Software model result indicates that the entity is being consumed by the SQL Server Enterprise software model.



The use case of prioritizing certain entities to consume a specific license over others can be extended to many other scenarios. For example, software suites can be prioritized to consume licenses first, or licensing a particular device with a different license metric over others.

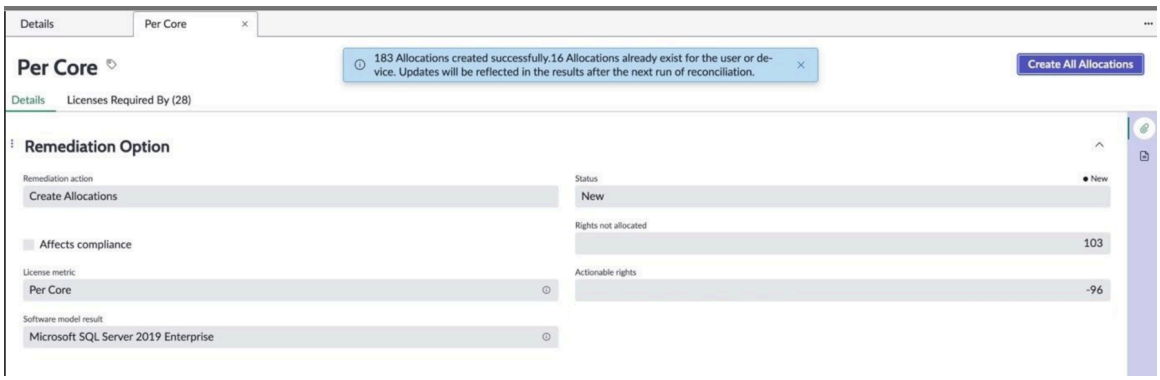
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Example: Locking license assignments

Lets say, the SAM Manager is happy with the assignment of license consumption performed by the Software Asset Management application. You can view License Metric Results and Remediation Options for a software model result from a Product Result record. On the License Metric Results page, the **Not allocated in use** column shows the number of rights that are used to license installations, but not allocated. When this value is greater than zero, remediation options **Create Allocations** and **Remove Unallocated** are displayed on the Remediation Options page. For more information, see View software model results.



The **Create Allocations** remediation option enables the SAM Manager to lock assignments for all entities (device/user) or individual entity, so that during future reconciliation runs, the license consumption occurs exactly as previously performed.



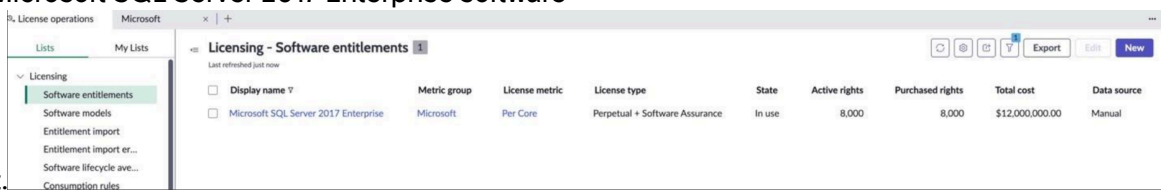
The allocation will be added to the entitlement immediately after performing the remediation action. For more information about remediation options, see View software model results.

Example: Overriding license assignment to a host or VM

Lets say, there's a SQL Server Enterprise license, and Software Asset Management has optimized licensing by assigning it to the virtual layer. If your license strategy involves assigning licenses to the host layer, you can adjust this approach.

To override the license assignment:

1. In the Software Asset Workspace, navigate to **License Operations** > **Licensing**.
2. Select **Software entitlements**.
3. Select the software entitlements for SQL Server. For example, select the Microsoft SQL Server 2017 Enterprise software entitlement.



4. Select the **Device Allocations** tab and then select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Add the Device Allocations details. For more information, see Create device allocation. When allocating license to the Host or VM, based on the value provided in the **Quantity** field, the Software Asset Management application determines the core count based on the following criteria:
   - If an exact number of cores isn't provided, the Software Asset Management application automatically uses the actual core count of a machine for licensing purposes.
   - If fewer cores than the actual machine is provided, the Software Asset Management application counts the exact number of cores present on the machine for licensing purposes.
   - If more cores than the actual machine is provided, the Software Asset Management application uses the number you entered. However, the surplus is marked as Allocated not in use for licensing.

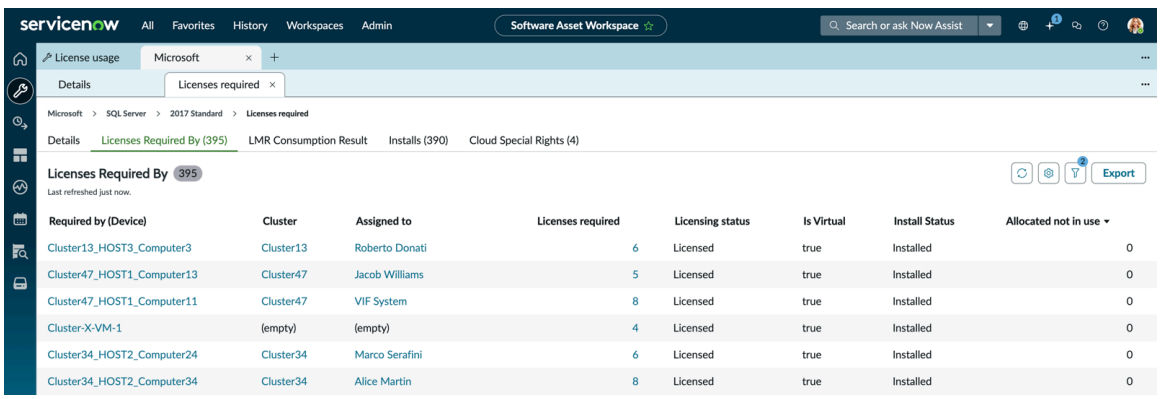
Lets allocate one license to the Microsoft SQL Server 2017 Enterprise Software entitlement, and save the entitlement, then run software reconciliation. For more information, see Run software reconciliation in the workspace.



Cluster 103 has 3 hosts each with 16 cores. In the previous example, the license allocation was adjusted to 1 for one entitlement. The Software Asset Management application assigns the host the correct licenses based on the number of cores.

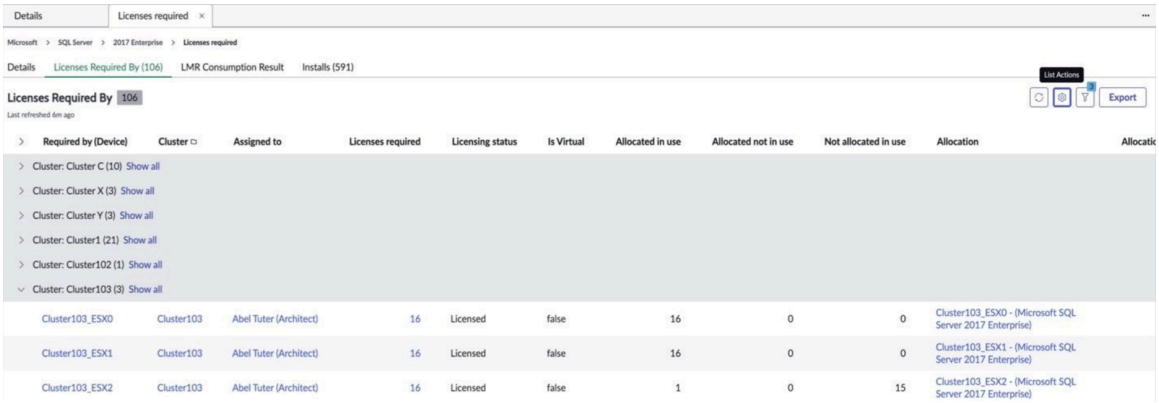


The Software Asset Management Manager can check the license usage by the cluster. To check the license usage, navigate to **License usage** > **License Metrics Result** > **Licenses Required By**. Select the **Is Virtual** column value as **false** to verify that it's licensed at the Host layer.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can customize the Licenses Required By page by adding columns such as **Allocated in use**, **Not allocated in use**, and **Allocation**. The Allocated in use column displays the count of rights that are allocated and are used to license installations. For more information about license usage by the cluster, see View calculations for your licenses in workspace.



When allocating software licenses, follow the licensing rules supported by the publisher.

Important:

- Allocation isn't required for the subscription products.
- According to Microsoft licensing rules, host layer licensing isn't supported for SQL Server Standard. When you allocate the license at host level, the allocated license number is shown in the **Allocated not in use** column.
- Avoid allocating licenses to a cluster directly. Instead, allocate them to the hosts or VMs within the cluster. When you allocate a license to a cluster, the allocated license number is shown in the **Allocated not in use** column.
- When the **Allocated not in use** column value is greater than zero, the **Remove Allocations** remediation option is automatically created for each unique license metric in the software model.

Licensing support for Microsoft SQL Server enterprise on Server+ CAL

Leverage the enhanced licensing rule to optimize licensing for legacy#Microsoft SQL Server Enterprise edition licenses under the Server + CAL licensing model with Software Assurance (SA).

Microsoft no longer sells new SQL Server Enterprise Server + CAL licenses, but existing customers with active software assurance can continue to use this licensing. The#Software Asset Management Professional application enables you to license SQL Server based on a combination of server licenses and client access licenses (CALs).

Licensing rules for SQL Server enterprise on Server + CAL Model

The following types of licensing support are available for SQL Server Enterprise on Server/CAL licensing support:

- On Physical Servers: For customers deploying SQL Server Enterprise Edition using the server/CAL model in a physical environment, each Operating System Environment (OSE) can only utilize up to twenty physical cores. This technical limitation is enforced by Microsoft, so no additional action is required from administrators.
- On Virtual Machines: For customers using SQL Server Enterprise Edition server licenses in virtualized environments, each group of virtual machines tied to a single server license (up to four VMs per server license) is allowed access to a combined maximum of twenty hardware threads at any time. This limitation will be managed and enforced by ServiceNow SAM Pro.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The following formula is used to determine the number of licenses required when using the Server + CAL licensing model:

```
Max ( (Sum of number of VM) / 4, (Sum of total VM cores) / 20 )
```

To determine the number of licenses needed, divide the total number of virtual machines (VMs) by 4 (as one server license covers up to 4 VMs) and divide the total number of cores (threads) across all VMs by 20 (as each license allows up to 20 threads). The higher of this two result is the required number of licenses.

For example, the cluster ABC consists of three hosts. Each host can run up to 13 virtual machines (VMs), and each VM may have a distinct number of processor cores assigned. The licensing entitlement is SQL Server 2019 Enterprise edition with Software Assurance (SA), which utilizes the Server Core Licensing model. The following table demonstrates the calculation process for determining the required number of licenses, ensuring proper compliance based on the potential number of VMs and processor cores.

License required for Server + CAL licensing model

Host name	Number of VMs	Number of potential VMs	Number of potential cores	Server licenses required
Host A	4	13	72	Maximum ((Number of potential VMs) / 4, (Total VM cores) / 20) = Max (13/4, 72/20) = Max (3.25, 3.6) = 4 licenses
Host B	4	13	72	Maximum ((Number of potential VMs) / 4, (Total VM cores) / 20) = Max (13/4, 72/20) = Max (3.25, 3.6) = 4 licenses
Host C	5	13	72	Maximum ((Number of potential VMs) / 4, (Total VM cores) / 20) = Max (13/4, 72/20) = Max (3.25, 3.6) = 4 licenses

When calculating the required licenses, the maximum number of potential VMs per host is crucial because licensing is based on potential, not actual, usage. In this example, each host can run up to 13 VMs, so this number is used for the calculation. For the cluster, the total number of server licenses required is 12. Client Access Licenses (CALs) must be calculated separately and aren't included in this formula. This approach ensures compliance with Microsoft's licensing requirements and provides clarity on the number of server licenses to be procured.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: For detailed information about Client Access Licenses or CAL licensing, see Microsoft server software CAL setup on ServiceNow® Software Asset Management Professional.

Configuring Microsoft SQL server enterprise when you have multiple licensing models

For configuring the Microsoft SQL Server Enterprise on Software Asset Management Professional, see Microsoft SQL server enterprise, see https://support.servicenow.com/kb?sys_kb_id=6ec3c13d93da3610080af35d6cba106e&id=kb_article_view.

License usage analysis

Gain visibility into the end-to-end journey from installing software to consuming licenses.

Overview of license usage analysis

Enable SAM managers to map the entire process from software installation to license utilization. This process includes identifying licenses used for each installation and differentiating between installations that have been used and those installations that haven't.

To gain further insights into your installations, use node maps for a detailed numerical breakdown. For each product, explore the installation layer to see the product versions and editions, examine the consumption status layer to determine if the installations are licensed, unlicensed, ignored, or require action. Finally, review the licensing layer that displays the software model results.

The nodes of a node map are stored in the Install Consumption Nodes [samp_install_consumption_nodes] table and the nodes are generated during reconciliation. You can view the node map in the License operations view in the Products with installs list. For details on node maps, see View license usage for your installations.

Benefits to the SAM manager

- Verify that the total number of installations for a product aligns with the sum of used and not used installations.
- Determine the licensing status of the installations: licensed, unlicensed, requiring action, and ignored.
- Determine all issues related to installations in one view.
- Determine all key licensing concepts applied such as downgrades and inference.
- Track usage statistics by viewing the consumption percentage and installation status count.

Considerations for node maps

Here are some special considerations to keep in mind for node maps:

- Grouping: Reconciliation can be run with a group and a subgroup. The node map displays each group and subgroup as nodes.
- Domain separation: Reconciliation can be executed for a specific domain level, displaying domain-separated information based on the user's domain. If a product spans multiple domains, a separate node map gets generated for each domain. Consequently, you can view each node map within its respective domain, resulting in a single product having multiple node maps in the same reconciliation run.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

View license usage for your installations

Employee off-boarding process for asset reclamation

Coordinate an employee's off-boarding process via a workflow that lets you request, assess, and remove assets.

The Software Asset Management off-boarding process entails the return of all software licenses assigned to the employee. Additionally, all software installations are removed from the devices, all user allocations are removed, and access to SSO, SAP, and Citrix products is revoked.

When an employee leaves an organization or moves to a different role, retrieving the assets assigned to the employee necessitates extensive coordination between the Human Resources department and the asset manager. You can create an off-boarding catalog request, which initiates a prescriptive workflow to efficiently retrieve assets and restock them in the inventory, reassign them, send them for repair, or dispose as required.

Note: For information on the Hardware Asset Management asset reclamation process, see Asset reclamation.

You can create an asset reclamation request via the Service Catalog. Once the request is created, reclamation line items are created that comprise of a series of tasks. These tasks can only be accessed and performed only by the sam_user role. Once all the tasks are closed, the reclamation line item is complete. After all the reclamation line items are complete, the catalog request is also completed. For information on creating an off-boarding catalog request, see Create a catalog request to reclaim assets.

Note: Software reclamation line items of the type Device Reclamation are created for each device that is returned, provided the device has software installations on it and that device was selected in the Reclaim Asset form. An additional software reclamation line item of the type User Reclamation is created if the **Employee Separation** check box was selected in the Reclaim Asset form.

Windows Server cluster license optimization

Optimize rights used for Windows Server clustering based on costs and compliance criteria.

Windows Server installations are categorized into two editions - Standard and Datacenter. Windows Server Standard and Datacenter editions are licensed by physical cores. The licenses are available in packs of 2 and packs of 16. The minimum license requirements for Windows Server clustering is:

- All physical cores must be licensed
- 8 core licenses per processor
- 16 core licenses per server

A cluster is licensed by calculating the maximum number of virtual machines (VMs) that can run on one physical host.

The Windows Server Standard edition is licensed for 2 operating system environments (OSEs) or Hyper-V containers. Additional OSEs require additional licenses (physical server is licensed for every 2 OSEs, minimum of 16 rights). Windows Server Datacenter edition is licensed for unlimited OSEs.

The cluster or host density is determined by dividing the active operating systems by 2. The system property *com.snc.samp.windowserver.license.threshold* with a default value of 4.59 is used for marking the host or cluster density. This property is a ratio of the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

cost of Datacenter and non Datacenter licenses and identifies the optimal cluster size for Datacenter licenses. You can modify the value of this property based on the purchase costs for these licenses. Low density clusters are licensed by non Datacenter licenses starting from low to high density. High density clusters are licensed by Datacenter licenses starting from high to low density. Optimal license and potential savings are generated for host or cluster using non optimal licenses.

The Windows Standard rights are used first for the Standard list by using them from the smallest to the largest within this list. After using Standard rights for low density host or cluster, the remaining low density host or cluster are licensed by the remaining Datacenter rights from high to low density. After using Datacenter rights for high density host or cluster, the remaining high density host or cluster are licensed by the remaining Standard rights from low to high density. Clusters that do not have enough Datacenter or Standard rights to consume are marked as unlicensed.

A new table, Potential savings by optimizing licenses, [samp_license_optimization_summary] is created to store information about licensing Windows Server software installed on each device.

Microsoft Server Infrastructure and License Consumption report

Get a unified overview of your Microsoft server products, including their infrastructure, license usage, and exemptions, with detailed justifications for exemptions.

Overview of Microsoft Server Infrastructure and License Consumption report

The Microsoft Server Infrastructure and License Consumption report is a single report that gives you insights into Microsoft server product deployments and license usage across various metrics. This comprehensive report includes detailed infrastructure information, covering cloud, on-premise, and standalone environments, as well as license usage and exemptions, complete with detailed justifications for the exemptions.

The report is updated weekly through the scheduled job *`SAM - Generate Microsoft Infra Licensing Report`*.

To view this report in the Software Asset Workspace, navigate to **License usage** > **Reports** and select the report titled **Microsoft Server Infrastructure and License Consumption**.

Benefits of the Microsoft Server Infrastructure and License Consumption report

The Microsoft Server Infrastructure and License Consumption report helps in effectively managing Microsoft server licenses across complex hybrid IT environments.

Organizations frequently struggle with the following problems:

- Fragmented visibility: License data is scattered across various tools and spreadsheets.
- Complex topologies: Intricate setups such as clusters, virtual machines (VMs), cloud instances create challenging licensing scenarios.
- Compliance risk: Difficulty demonstrating license compliance during audits.
- Cost optimization: Missed opportunities to identify over-licensing or optimize costs.
- Cloud migration: Uncertainty regarding license portability and cloud-specific advantages.

This report helps solve these problems by providing a single, authoritative view of your Microsoft server licensing, empowering you to make informed decisions on license procurement, allocation, and optimization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Supported license metrics

The following license metrics are considered for all Microsoft server products:

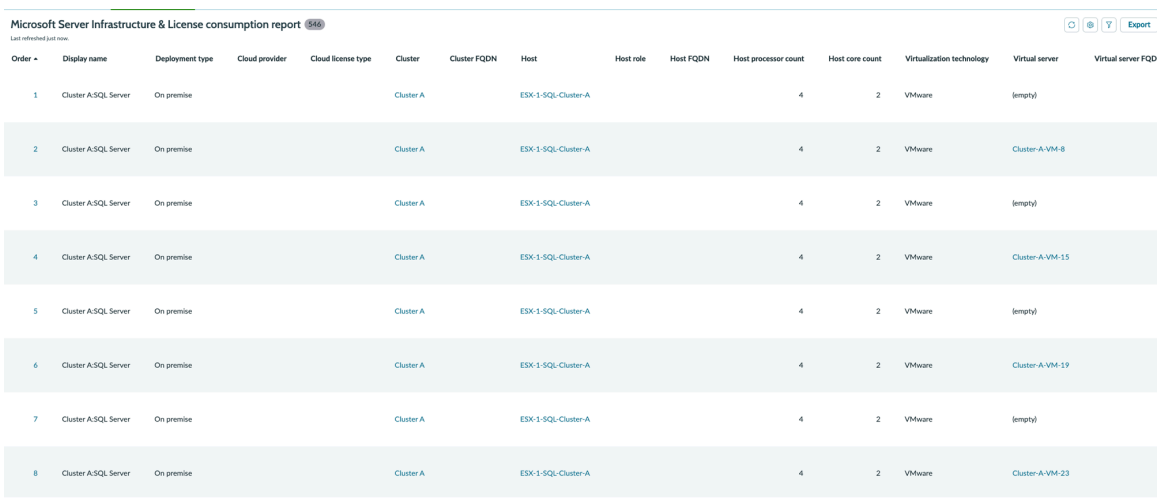
- Per Core
- Per Core (with CAL)
- Server (Per Server)
- Server (Per Instance)
- Per Processor

Layout of the Microsoft Server Infrastructure and License consumption report

The Microsoft Server Infrastructure and License Consumption report follows a hierarchical structure designed to provide clarity and ease of navigation. The report uses a parent-child relationship where infrastructure components are nested under their logical containers:

- Clusters: Clusters are presented first, containing multiple hosts and VMs, each with different software models installed. Based on how the installation is licensed, either on a host or on a VM, the required licenses are shown on the corresponding host or VM record.
- Cloud installations:
  - Cloud installations on hosts or VMs are displayed, including AWS, Microsoft Azure, and Google Cloud Platform.
  - Cloud-specific licensing information is provided, such as: License Type such as BYOL or License Included, Dual Use Rights, such as Azure-specific benefits for Windows Server, and Edition Flexibility such as Azure benefits for Windows Server and SQL Server.
- Standalone installations are on-premise devices that aren't part of any cluster. These include individual physical servers and individual VMs without cluster context.
- Cross-licensed products: Microsoft products that are licensed by other license metrics are displayed separately. For example, Visual Studio Professional (Per User metric) licensing Windows Server.
- Unlicensed installations: Installations that are either ignored or require action are displayed last, with detailed reasons for their unlicensed status.

To access all the information on the report, scroll all the way to the right of the report. For enhanced usability, you can also export the entire report to an Excel format, facilitating easier review and analysis.


Microsoft Server Infrastructure & License consumption report 540

Last refreshed just now.

Export

Order	Display name	Deployment type	Cloud provider	Cloud license type	Cluster	Cluster FQDN	Host	Host role	Host FQDN	Host processor count	Host core count	Virtualization technology	Virtual server	Virtual server FQD
1	Cluster A:SQL Server	On premise			Cluster A		ESX-1-SQL-Cluster-A			4	2	VMware	(empty)	
2	Cluster A:SQL Server	On premise			Cluster A		ESX-1-SQL-Cluster-A			4	2	VMware	Cluster-A-VM-8	
3	Cluster A:SQL Server	On premise			Cluster A		ESX-1-SQL-Cluster-A			4	2	VMware	(empty)	
4	Cluster A:SQL Server	On premise			Cluster A		ESX-1-SQL-Cluster-A			4	2	VMware	Cluster-A-VM-15	
5	Cluster A:SQL Server	On premise			Cluster A		ESX-1-SQL-Cluster-A			4	2	VMware	(empty)	
6	Cluster A:SQL Server	On premise			Cluster A		ESX-1-SQL-Cluster-A			4	2	VMware	Cluster-A-VM-19	
7	Cluster A:SQL Server	On premise			Cluster A		ESX-1-SQL-Cluster-A			4	2	VMware	(empty)	
8	Cluster A:SQL Server	On premise			Cluster A		ESX-1-SQL-Cluster-A			4	2	VMware	Cluster-A-VM-23	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Understanding licensing layers

Report classification of installations by licensing layer

Licensing layer	Description	Example
Physical layer	• Software is installed only on the physical host. • Licenses are assigned at the physical server level.	Windows Server installed on bare metal hardware.
Virtual layer	• Software is installed only on VMs. • Licenses are assigned at the VM level.	SQL Server installed on VMs, with each VM requiring separate licenses.
Mixed layer (physical/ virtual)	• Software is installed on both the physical host and VMs. • Licenses cover both the host and VMs. • Special Handling: For Hyper-V environments, the report shows comprehensive licensing across the host and all VMs.	Windows Server on a Hyper-V host with VMs running Windows Server.

Description of selected metrics in the Microsoft Server Infrastructure and License consumption report

While the full report includes numerous metrics, the metrics that need detailed explanation are mentioned in the table:

Metric	Description
Deployment Type	Indicates whether the installation is on-premise, cloud, or standalone.
Cluster FQDN	A unique domain name that identifies an entire distributed system, or cluster, to clients and other nodes within the cluster.
Host processor count	Number of CPUs that are assigned to the physical host.
Host core count	Number of cores within each CPU that is assigned to the physical host.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Metric	Description
Virtualization technology	Virtualization technology that you're using to deploy and manage your physical hosts and VMs such as VMware, Hyper-V, RHV, Nutanix.
VM movement details	The details with regard to the movement of a VM within or across physical hosts or cloud environments.
VM CPU thread count	Maximum number of threads a virtual machine can run concurrently.
Software mode licensing	The software model used to license the installation.
Product	List of products installed on this device.
Server product	Microsoft server products specifically identified for licensing.
Software Install	List of software installations related to this licensing requirement.
Dual user rights applied	Indicates if Microsoft Azure dual use rights for Windows Server are applied (Yes, No, or N/A).
Edition flexibility applied	Indicates if Microsoft Azure edition flexibility benefits for Windows Server and SQL Server are applied (Yes, No, or N/A)
Unlicensed reason	Mentions the reason why an unlicensed installation has been ignored or requires action.
Additional notes	Provides details on assessment of all available licensing options. Additionally, explanation of rights that refer to how your rights are calculated and consumed post the reconciliation process is also mentioned.
Licensing layer	Indicates where the component is licensed: physical, virtual, or mixed (physical/virtual).
Licensing status	Status of the installation: Licensed, Unlicensed, Ignored, or Requires Action.

Use cases covered in the report

The following use cases are supported by the report:

- Component installations licensed by suite license.
- Component installs licensed by suite license but some devices have only one component installed.
- Component installs licensed by component devices.
- The product is also licensed by other license metrics.
- Dual Usage Rights.
- Licensing at the host layer.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Bring your own license or subscription to the public cloud

Bring your own license (BYOL) support enables you to determine the license compliance of your Microsoft and Oracle software products across hybrid infrastructures. Bring your own subscription (BYOS) support enables you to determine the license compliance of your Red Hat Enterprise Linux (RHEL) software products across hybrid infrastructures.

When organizations move to the public cloud, existing on-premise perpetual licenses are carried over to the cloud using BYOL. Existing on-premise subscription licenses are also carried over to the cloud using BYOS. BYOL and BYOS help improve license optimization, as organizations must pay only for infrastructure costs.

The Software Asset Management application supports BYOL for Microsoft and Oracle software products and BYOS for RHEL software products as follows:

Note: `The Supported infrastructure type column in the following table applies to Infrastructure as a Service (IaaS) models only.`

Product	Product edition	BYOL or BYOS	Supported cloud providers	Supported service model	Supported infrastructure type
Microsoft SQL Server	All editions	BYOL	• AWS • Microsoft Azure • Google Cloud Platform (GCP)	Infrastructure as a Service (IaaS)	Shared and dedicated
Microsoft Windows Server	All editions	BYOL	• AWS • Microsoft Azure • Google Cloud Platform (GCP)	Infrastructure as a Service (IaaS)	Shared and dedicated

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

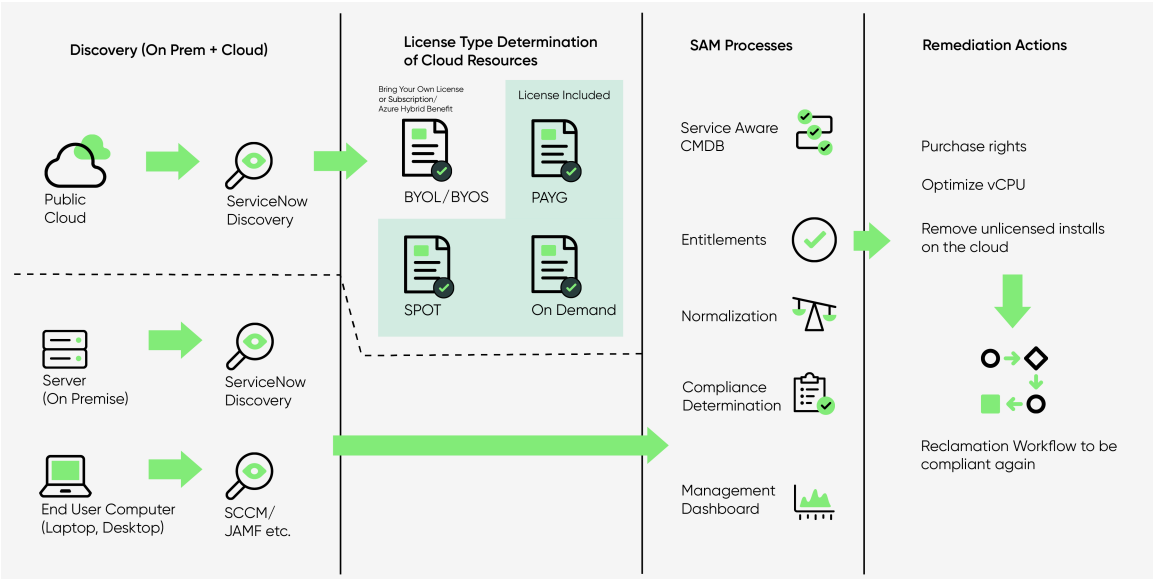
Product	Product edition	BYOL or BYOS	Supported cloud providers	Supported service model	Supported infrastructure type
Oracle Database	• Oracle Database Standard Edition • Oracle Database Standard Edition One • Oracle Database Standard Edition 2 • Oracle Database Enterprise Edition	BYOL	• AWS • Microsoft Azure	• AWS: Infrastructure as a Service (IaaS) and Platform as a Service (PaaS) **Note:** In AWS, the IaaS model refers to the Amazon Elastic Computing (EC2) web service, while the PaaS model refers to the Amazon Relational Database Service (RDS). • Microsoft Azure: Infrastructure as a Service (IaaS)	Shared and dedicated
Oracle WebLogic Server	• Oracle WebLogic Server Standard Edition • Oracle WebLogic Server Enterprise Edition • Oracle WebLogic Server Suite Edition	BYOL	• AWS • Microsoft Azure	Infrastructure as a Service (IaaS)	Shared and dedicated
Red Hat Enterprise Linux Server	All editions	BYOS	• AWS • Microsoft Azure • Google Cloud Platform (GCP)	Infrastructure as a Service (IaaS)	Shared

BYOL and BYOS support on the Software Asset Management application help you:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Discover perpetual and subscription-based software licenses automatically across on-premise and cloud environments, such as AWS, Microsoft Azure, and GCP.
- Determine the license compliance of the following software products across your hybrid infrastructure:
  - Microsoft SQL Server
  - Microsoft Windows Server
  - Oracle Database
  - Oracle WebLogic Server (Standard, Enterprise, and Suite Editions)
  - Red Hat Enterprise Linux Server
- Provide advanced support for optimization through Cloud Special Rights, such as dual use rights, edition flexibility, and unlimited virtualization.
- Perform remediation when your software is out of compliance.

Bring your own license or subscription flow



Prerequisites

Before you can begin determining the license compliance of software across your hybrid infrastructures, you must complete the following prerequisites:

- Activate the Discovery (com.snc.discovery) plugin on your ServiceNow instance.

  See Request Discovery for detailed instructions.

- Request and install the Discovery and Service Mapping Patterns application from the ServiceNow Store.

  See Discovery patterns used by ITOM Visibility for more information on Discovery and Service Mapping patterns.

- Migrate cloud discoveries from Cloud API (CAPI) probes to pattern-based discovery.

  See CAPI to Pattern Migration: Procedure for switching from CAPI-based Cloud Discovery to pattern-based Cloud Discovery [KB0827153] for detailed instructions.

- Request and install the CMDB CI Class Models application from the ServiceNow Store.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

See CMDB CI Class Models store app for more information on the CMDB CI Class Models application.

- Request and install the Cloud Cost Management application from the ServiceNow Store.

  The Cloud Cost Management application is required for discovering the license types of software in your Microsoft SQL Server deployments on AWS. See Cloud Insights application for more information on the Cloud Cost Management application.

BYOL and BYOS discovery

With BYOL and BYOS, the ServiceNow® Discovery application locates and identifies licensable software in both your on-premise and cloud environments using Discovery and Service Mapping patterns. The Discovery application uses Amazon AWS Cloud, Microsoft Azure Cloud, and Google Cloud discovery patterns to discover the following resources for software in cloud environments:

- Cloud provider
- Virtual machine details
- Service model type, such as IaaS or PaaS
- Host infrastructure type for IaaS, such as shared or dedicated
- License type, such as BYOL, BYOS, or License Included
- Software that is installed on the virtual machine

Note: The Amazon AWS Cloud, Microsoft Azure Cloud, and Google Cloud discovery patterns are included in the Discovery and Service Mapping Patterns store application. For more information on Amazon AWS Cloud discovery patterns, see Amazon AWS Cloud components discovery using patterns. For more information on Microsoft Azure Cloud discovery patterns, see Microsoft Azure Cloud components discovery using patterns. For more information on Google Cloud discovery patterns, see Google Cloud Platform (GCP) resource inventory discovery with Patterns and Google Cloud Platform (GCP) Organization discovery with Patterns.

Resources for your discovered software are populated and stored in corresponding Configuration Management Database (CMDB) tables, including the Host [cmdb_ci_cloud_host] and Serverless Hardware [cmdb_ci_serverless_hardware] tables, on your ServiceNow instance.

The Software Asset Management application then determines the license types of your discovered software by using Discovery or Cloud Cost Management (CCM) data, depending on the software product and cloud provider.

License type determination varies by product and cloud environment, as shown in the following table.

License type discovery by product and cloud

Product	AWS	Microsoft Azure	GCP
Microsoft Windows Server	Automatic	Automatic	Automatic
Microsoft SQL Server	CCM or manual	Automatic	Automatic
Oracle Database	Automatic	Manual	None
Oracle WebLogic Server	Manual	Manual	None

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License type discovery by product and cloud (continued)

Product	AWS	Microsoft Azure	GCP
Red Hat Enterprise Linux Server	Automatic	Automatic	Automatic

The Software Asset Management application identifies and applies license types by using the following methods.

Automatic determination using key-value pairs

For supported products, the Software Asset Management application automatically determines license types by generating key-value pairs. These key-value pairs are stored in the Key Values [cmdb_key_value] table. Each key-value pair consists of a **Key** in the **<*software-product*>_License_Type_automatic** format and a **Value** of either **License Included**, **BYOL**, or **BYOS**.

Manual specification using key-value pairs

When automatic determination isn't supported, you must manually specify license types by creating key-value pairs in the Key Values [cmdb_key_value] table with a **Key** of *`software-product`*`_Server_License_Type` and a **Value** of either `License Included` or BYOL. For example, Oracle WebLogic Server requires a key of `Oracle_WebLogic_Server_License_Type`. After you create the key-value pairs, the specified license types apply to the associated configuration items (CIs).

Cloud Cost Management–based determination

For Microsoft SQL Server on AWS, the Software Asset Management application can determine license types by using billing records from the Cloud Cost Management application.

Note: If you do not manually specify a license type for a software product when required, the Software Asset Management application does not license the installation due to insufficient information.

You can use these key-value pairs to determine whether the associated software licenses are using the BYOL, BYOS, or License Included licensing model. The BYOL and BYOS licensing models include license purchasing options such as Azure Hybrid Benefit. The License Included licensing model includes license purchasing options such as Pay As You Go (PAYG), SPOT, and On Demand. With the License Included licensing model, the cloud provider is responsible for managing licenses.

Note: For Oracle Database, support for the BYOL and License Included licensing models is based on the cloud provider and Oracle Database version that you're using.

- AWS RDS (PaaS): The BYOL licensing model is supported on Oracle Database Standard Edition, Standard Edition One, Standard Edition 2, and Enterprise Edition. The License Included licensing model is supported on only Oracle Database Standard Edition 2.
- AWS EC2 (IaaS): Only the BYOL licensing model is supported.
- Microsoft Azure (IaaS): Only the BYOL licensing model is supported.

Software reconciliation for BYOL and BYOS license compliance

After your discovered software is marked as BYOL, BYOS, or License Included, reconciliation runs on the software that is marked as BYOL or BYOS. You can then use the resulting information to determine the software compliance across your hybrid infrastructure.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

BYOL and BYOS licensing rules can differ for the same software products across different cloud providers. For example, Windows Server has different licensing rules on AWS and on Microsoft Azure. These rules must be combined with existing on-premise rules so that you can determine the complete license compliance position of each software product across your hybrid infrastructures. Microsoft offers special rights for products that are deployed on AWS vs Microsoft Azure, such as dual use rights, edition flexibility, and unlimited virtualization. For more information on licensing rules, see Licensing rules for BYOL and BYOS.

The Software Asset Management application automatically reconciles these rules and provides an accurate license position report that can be viewed in the License usage view of the Software Asset Workspace.

- You can view BYOL license rights for your Microsoft software products in the Microsoft publisher overview of the Software Asset Workspace. For more information on the Microsoft publisher overview, see Publisher overview for Microsoft in the Software Asset Workspace.
- You can view BYOL license rights for your Oracle software products in the Oracle publisher overview of the Software Asset Workspace. You can also view information about your Oracle Database deployments across hybrid infrastructures, based on the agreement type, in the Oracle Database Deployments per Agreement report. For more information on the Oracle publisher overview, see Publisher overview for Oracle in the Software Asset Workspace. For more information on the Oracle Database Deployments per Agreement report, see the Oracle Database Deployments per Agreement report.
- You can view BYOS license rights for your RHEL software products in the Red Hat publisher overview of the Software Asset Workspace. For more information on the Red Hat publisher overview, see Publisher overview for Red Hat in the Software Asset Workspace.

Cloud-based remediation options

To remediate non-compliance for cloud installations, the Software Asset Management application provides the following remediation options:

Remove Unlicensed Installs - Cloud

The **Remove Unlicensed Installs - Cloud** remediation option removes all cloud installations that are unlicensed for the associated software product.

When you select the **Remove Unlicensed Installs - Cloud** remediation option, removal candidates that follow the regular remediation workflow are created. After the removal candidates reach the **Awaiting Revocation** state, you can uninstall the cloud installations from your cloud provider and then mark the removal candidates as complete.

Optimize vCPU

The **Optimize vCPU** remediation option provides vCPU sizing optimizations based on the core count and core thread count. This remediation option is applicable only to Oracle Database Per Processor licenses on AWS RDS (PaaS). That Per Processor licensing is based on the number of vCPUs on which you install or run an Oracle database.

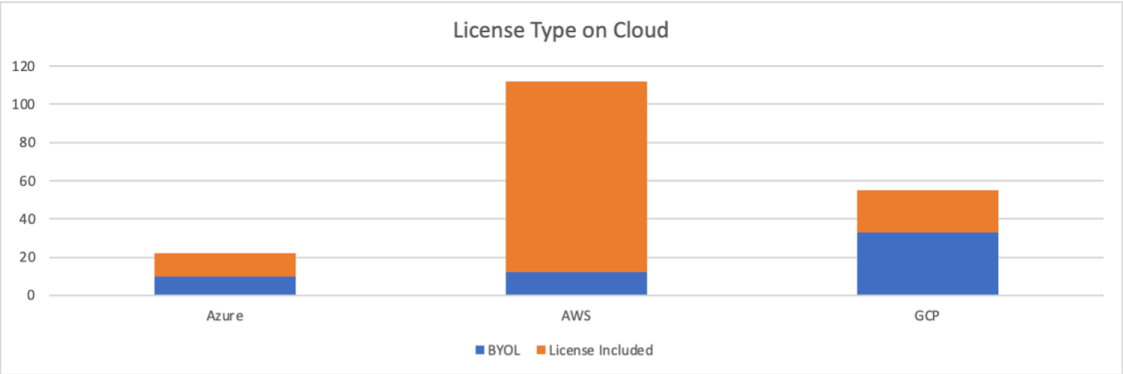
For more information on AWS core counts and core thread counts, see Configuring the processor for a DB instance class.

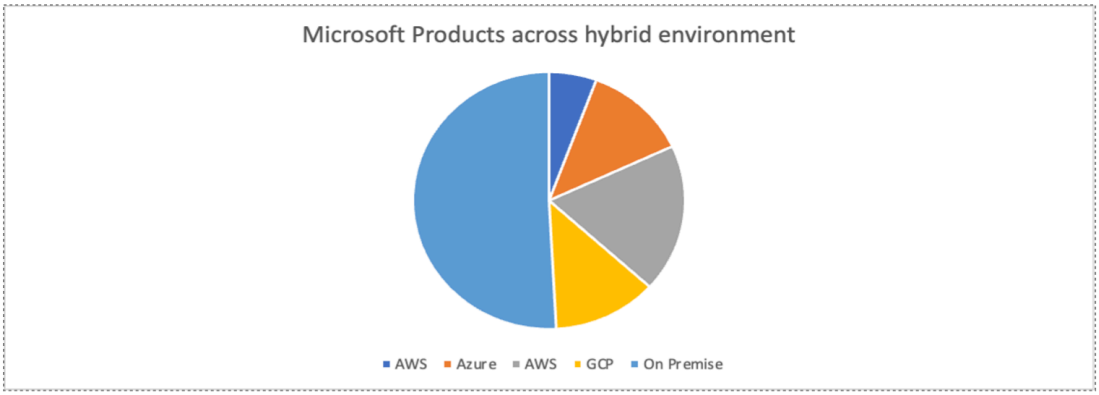
Microsoft Windows and SQL Server infrastructure details reports

You can use the Microsoft Windows and SQL Server infrastructure details reports to gain visibility into the SQL Server and Windows Server deployments and infrastructure for different cloud providers including Microsoft Azure, AWS, and GCP.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License types on cloud





Azure BYOL Realized Savings report

You can use the Azure BYOL Realized Savings report to gain visibility into the potential and actual cost savings for your Microsoft SQL Server and Microsoft Windows Server deployments on Microsoft Azure when using Azure Hybrid Benefit, which is the bring your own license (BYOL) licensing model for Microsoft Azure.

The Azure BYOL Realized Savings report is generated only if you have requested and installed the ServiceNow® Cloud Cost Management application from the ServiceNow Store. See Cloud Cost Management application for more information on Cloud Cost Management.

Note: This report is available only in the Software Asset Workspace. This report isn't available in the Software Asset Management classic application.

To view this report, launch the Software Asset Workspace by navigating to **Software Asset** > **Software Asset Workspace** on your ServiceNow instance. From the Software Asset Workspace, navigate to **License usage** > **Reports** > **Azure BYOL Realized Savings Report**.

Azure BYOL Realized Savings report

Field	Description
Virtual Machine	Azure virtual machine (VM) that Microsoft SQL Server or Microsoft Windows Server is running on.
Host Type	Type of Azure host that the Azure VM is running on. The options are **Shared** and **Dedicated**.
Location	Geographic location that the Azure host resides in.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Azure BYOL Realized Savings report (continued)

Field	Description
vCPU	Number of virtual CPUs (vCPUs) that are assigned to the Azure VM.
Hardware Type	Hardware type of the Azure host.
Operating System	Operating system (OS) version and edition that is running on Azure.
SQL Server	Microsoft SQL Server version and edition that is running on the Azure VM.
AHB on Windows Server	Field indicating if Azure Hybrid Benefit is enabled for Microsoft Windows Server.
AHB on SQL Server	Field indicating if Azure Hybrid Benefit is enabled for Microsoft SQL Server.
Standard price per month without AHB	Potential VM cost per month when Azure Hybrid Benefit isn't enabled. This value is based on the assumption that the VM is running for the entire month (720 hours).
Standard price per month with AHB	Potential VM cost per month when Azure Hybrid Benefit is enabled. This value is based on the assumption that the VM is running for the entire month (720 hours).
Standard Savings Realized	Potential VM cost saved per month by using Azure Hybrid Benefit. This value is based on the assumption that the VM is running for the entire month (720 hours).
Actual price per month without AHB	Actual VM cost per month when Azure Hybrid Benefit isn't enabled. This value is based on the actual number of hours that the VM was running for within a month.
Actual price per month with AHB	Actual VM cost per month when Azure Hybrid Benefit is enabled. This value is based on the actual number of hours that the VM was running for within a month.
Actual Savings Realized	Actual VM cost saved per month by using Azure Hybrid Benefit. This value is based on the actual number of hours that the VM was running for within a month.

Core infrastructure suite (CIS) support for BYOL

Use your on-premise CIS entitlements to license Windows Server installations on cloud platforms such as AWS and Microsoft Azure.

The CIS entitlements would license the Windows Server installations in accordance with the Microsoft licensing rules on cloud: If you licensed Windows Server through CIS, you can use the Azure Hybrid Use Benefit. The System Center component in CIS, however, is not covered.

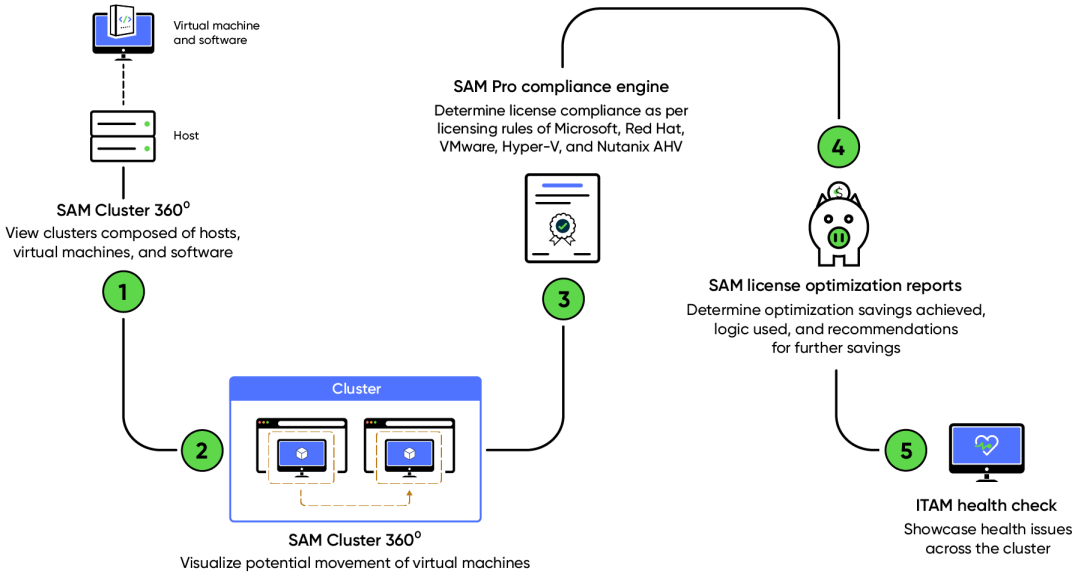
Understanding your cluster infrastructure

Get a holistic and strategic analysis of all the entities in your clusters in one view on the Software Asset Management application.

The SAM Cluster 360° feature simplifies the process of analyzing a cluster, which is typically a time-consuming task. This feature helps SAM managers to make strategic decisions by providing them with a visually comprehensive view of their cluster setup, licensing, and cluster health issues. Drill down to each node on a cluster for a deeper understanding. For detailed information on your cluster, see View your cluster setup in 360 degrees.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cluster overview



A cluster is a type of virtualization where hosts are grouped and share resources. This technology provides high availability, resource pooling, and load balancing for virtual machines that run on it. This technology provides the foundation for building highly resilient, scalable, and efficient virtualized environments.

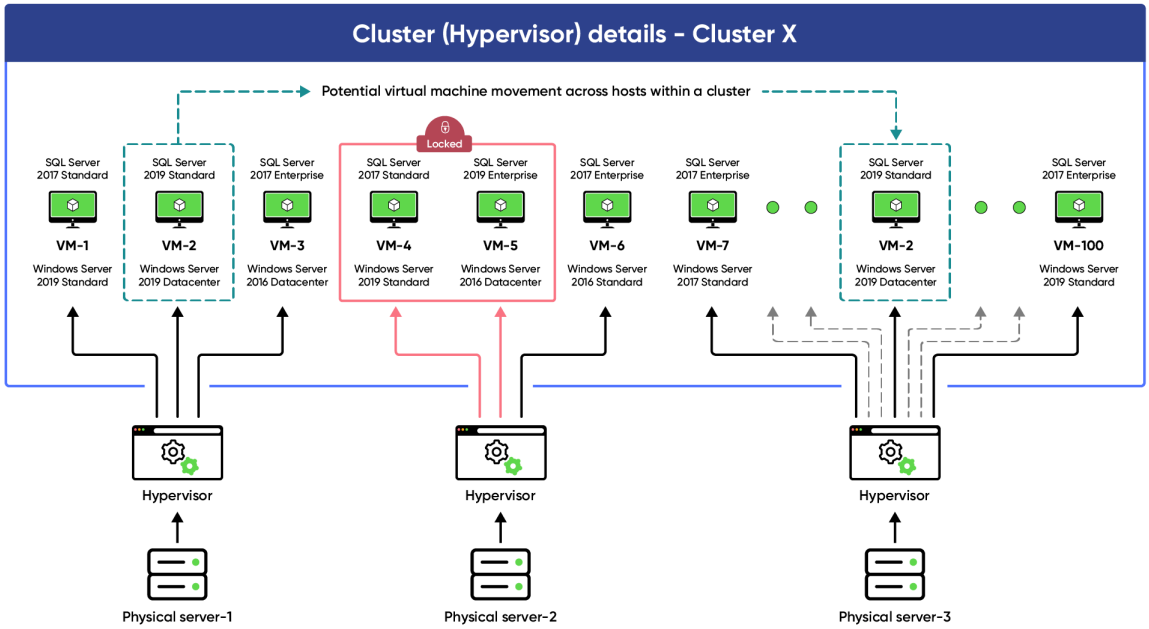
Each host has the capacity to run multiple virtual machines (VMs) and can be configured to support features such as high availability, DRS (Dynamic Resource Scheduling), and host affinity.

The VMs can move across the hosts depending on certain settings such as High availability or Distributed Resource Scheduler (DRS). Settings such as Host affinity can lock VMs to certain hosts.

Factors such as the number of VMs, movement of VMs, hosts, and VM cores in a cluster can affect your license compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cluster setup



Benefits of SAM Cluster 360°

SAM Cluster 360° provides a holistic and strategic analysis of clusters to support infrastructure understanding, license compliance, and health checks across the cluster.

The SAM Cluster 360° feature helps you to view and analyze the following concepts:

- Core infrastructure of a cluster: hosts, VMs, software, cores, and processors.
- All hosts and the VMs that can potentially move on them.
- All software, licensable and non-licensable, running on a cluster.
- All software consuming licenses.

Executive insights into KPIs using the Asset Management Executive dashboard

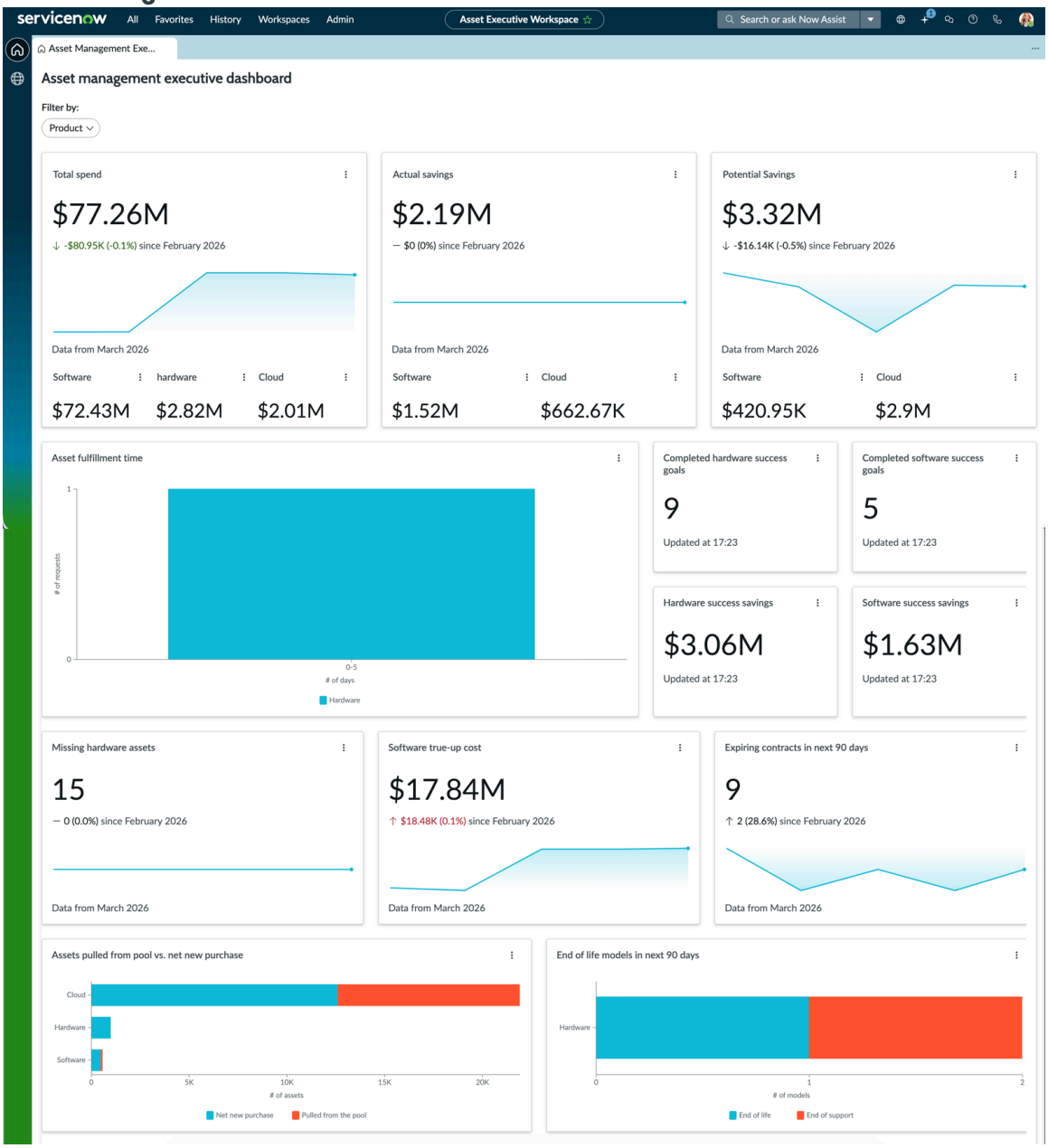
Use the Asset Management Executive dashboard to gain visibility into critical KPIs for the Software Asset Management application, Hardware Asset Management application, and the Cloud Cost Management application via a single dashboard.

To access the Asset Management Executive dashboard, you must either have the Software Asset Management application or the Hardware Asset Management application in your ServiceNow instance.

To view the Asset Management Executive dashboard, navigate to **Asset Executive Workspace** > **Asset Management Executive Dashboard**. A user with the role of sn_itam_common.asset_exec can access the dashboard.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard



You can filter the results in the dashboard by product, domain, or by both product and domain. If you filter by domain, the filter gets applied to all the widgets. If you filter by product, since some widgets are specific to certain products, the filter is not applied to all the widgets.

After you select a filter, a blue box appears on the right side of each widget, displaying one of the following numbers:

- 0: Indicates that no filter is applied to a widget.
- 1: Indicates that only one filter is applied to a widget.
- 2: Indicates that both the filters are applied to a widget.

Note: To use the domain filter, you must activate the plugins: com.glide.domain.msp_extensions.installer and com.snc.pa.domain_support.

The scheduled job, *Asset Management - Populate KPI aggregate table*, runs daily to update the data on the dashboard. To view the latest data for a widget, click the widget to display the list view page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The dashboard widgets vary depending on the application plugins that you've activated in your instance. The widgets available with each application are listed in the following table:

Asset Management Executive Dashboard widgets

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
Total spend	Total cost of all entitlements for all products. Source table: License Metric Results [samp_license_metric_result].	Total cost of all hardware assets whose status is either **In stock**, **In use**, **In maintenance**,or **In transit**. Source table: Hardware [alm_hardware].	Total active cost of all cloud resources. Source table: Spend Report Daily Aggregated Cost [sn_cld_spend_core_daily_aggregated_cost].
Actual savings	Total yearly savings for all products. This value is calculated as the total savings from closed complete reclamation candidates. Source table: Removal Candidate [samp_sw_reclamation_candidate].	Not applicable.	This value is calculated as the monthly savings on cloud resources. **Note:** This widget appears only if you have the Software Asset Management application installed on your instance. Source table: Cloud Insights Rightsizing Recommendation Automatics (sn_clin_core_rs_recommendation_automatic) where State = Completed.
Potential savings	Cost saved if removal candidates are reclaimed. Source table: Removal Candidate [samp_sw_reclamation_candidate].	Not applicable.	Total of potential savings on a monthly basis on cloud rightsizing, cloud unused machines, cloud reservations, and cloud business hours. **Note:** This widget appears only if you have the Software Asset Management application installed on your instance. Source tables:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
			• Cloud Insights Rightsizing Recommendation Automatics [sn_clin_core_rs_recommendation_automatic]. • Cloud Insights Unused Recommendation [sn_clin_core_rs_unused_recommendation]. • Reserved Instance Recommendation [sn_clin_core_ri_recommendation].
Assessment fulfillment time	Fulfillment time bar graph of software requests from the Service Catalog. The graph shows the number of requests and the number of days taken to close those requests in the ranges of 0-5, 6-10, 11-20, 21-30, or 31+ days. Source table: Asset fulfillment time [asset_fulfillment_time].	Fulfillment time bar graph of hardware requests from the Service Catalog. The graph shows the number of requests and the number of days taken to close those requests in the ranges of 0-5, 6-10, 11-20, 21-30, or 31+ days. Source table: Asset fulfillment time [asset_fulfillment_time].	Not applicable.
Completed software success goals	Number of success goals completed for the Software Asset Management application. Source table: SAM Success Goal [samp_success_goal]. **Note:** This widget is available only when the Software Asset Workspace (sn_sam_workspace) store application is installed.	Not applicable.	Not applicable.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
Software success savings	Actual savings from completed success goals. Source table: SAM Success Goal [samp_success_goal]. **Note:** This widget is available only when the Software Asset Workspace (sn_sam_workspace) store application is installed.	Not applicable.	Not applicable.
Missing hardware assets	Not applicable.	Count of missing, lost, or stolen hardware assets. Source table: Missing Hardware Assets [missing_hardware_assets].	Not applicable.
Software true-up cost	Cost of the products actually being used. Source table: Product Results [samp_product_result].	Not applicable.	Not applicable.
Expiring contracts in 90 days	Count of software contracts that are going to expire in the next 90 days.	Count of hardware contracts that are going to expire in the next 90 days.	Not applicable.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
	Note: If the Software Asset Management application and the Hardware Asset Management application both exist in your instance, then this widget shows the total number of software and hardware contracts together; not individual contracts for software and hardware.	**Note:** If Software Asset Management application and the Hardware Asset Management application both exist in your instance, then this widget shows the total number of software and hardware contracts together; not individual contracts for software and hardware.	
Assets pulled from pool vs net new purchase	Bar charts representing the number of requests for software assets being fulfilled from your inventory versus creating purchase orders for new assets. **Note:** Ensure that the Procurement (com.snc.procurement) plugin is activated in your instance to view software-related data for this widget. Source tables:	Bar charts representing the number of requests for hardware assets being fulfilled from your inventory versus creating purchase orders for new assets. Source tables: • Pool assets: Consume Asset Task [consume_asset_task]. • Net new assets: Purchase order line items [proc_po_item].	Bar charts representing the number of assets used from your inventory versus new assets being procured via purchase orders. Source tables: • Pool assets: Spend Report Monthly Cost [sn_cld_spend_core_monthly_cost]. • Net new assets: Purchase order line items [proc_po_item].

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
	• Pool assets: Assigned Allocations [alm_licenses_assigned]. • Net new assets: Purchase order line items [proc_po_item].		
End of life models in next 90 days	Number of software models that are reaching their end of life in the next 90 days. • End of life • End of support • End of extended support Source table: Software Lifecycle Report [sam_sw_product_lifecycle_report].	Number of hardware models that are reaching their end of life in the next 90 days. • End of life • End of support • End of extended support Source table: Hardware model [cmdb_hardware_model_lifecycle].	Not applicable.

Cloud cost simulation

Simulate the cost of moving your on-premise resources to the cloud environment before performing the migration.

Plugins required

The following plugins are required for supporting cloud cost stimulator recommendations:

- Cloud Insights application plugin (sn_clin_billing): for cloud infrastructure details and cost.
- Hardware Asset Management (sn_hamp): for end of life cycle for hardware.
- Cloud Migration Assessment application (com.sn_cloud_migration): for resource utilization.

Overview of cloud cost simulation

The sam_manager role specifies the criteria for migrating the resources to the cloud. For example, you may need all virtual machines installed with SQL Server or all virtual machines having end of life software. In addition the Software Asset Management application automatically provides recommendations based on End of Life software and hardware and resource utilization.

Based on the criteria or recommendation, the Software Asset Management application automatically selects the virtual machines that match your criteria. Once all the on-premise virtual machine have been identified, the Software Asset Management application matches those virtual machines with the virtual machines on the cloud: AWS or Azure.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The most optimal matching of resources is conducted and the total cost involved is given to you. Cost for the various cloud providers: AWS and Azure is mentioned along with or without the cost of Bring Your Own License (BYOL). Once the decision is made to move to a particular cloud provider, a change request can be created to move forward with the implementation.

For information on comparing and evaluating the estimate cost of migrating your resources to the cloud, see Cloud simulator dashboard.

Use cases

A sam_manager role can receive recommendations for migrating on-premise resources to the cloud while taking into account the following considerations:

- End of life for software: On some virtual machines, you may have software that is nearing the end of its life cycle. Calculate the cost of migrating these virtual machines to the cloud, taking into account all of the benefits. For example, Microsoft Azure offers free extended security updates for certain Microsoft products that have reached the end of their life cycle.

  Note: Recommendations are only shown for Microsoft Azure and AWS shared VMware virtual machines and not for dedicated host machines.

- End of life for hardware: You may have virtual machines running on hardware that is nearing its end of life phase. Simulate the cost of moving these virtual machines to the cloud.

  Note: Ensure that you have activated of the Hardware Asset Management (sn_hamp) plugin to get data on end of life cycle for hardware and hardware cost.

- Resource utilization: Some on-premise virtual machines may have low CPU and RAM utilization. Simulate the cost of moving these virtual machines to the cloud by recommending the appropriate sized virtual machines. For example, if a 32 vCPU virtual machine on-premises, is utilizing only 4 vCPU, the recommendation would be a 4-vCPU virtual machine on the cloud, resulting in cost savings.

  Note: Ensure that you have activated the Cloud Migration Assessment application (com.sn_cloud_migration) plugin to get data on resource utilization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

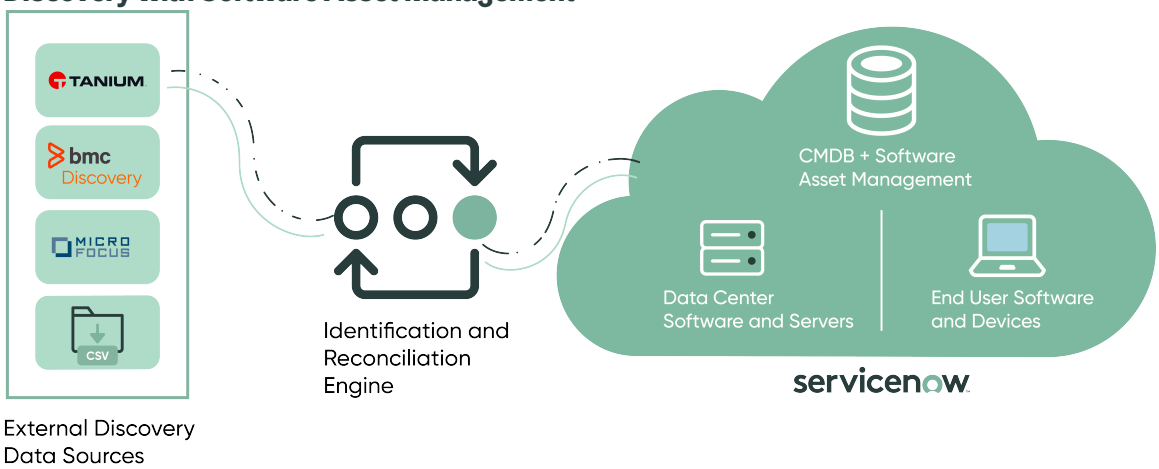
Software asset connections

Use third-party discovery sources to discover the installed software data that you can integrate with the Software Asset Management application.

The discovery process is an integral part of the Software Asset Management application. The discovery process consists of discovering where the installed software in your organization is installed, who the owner of the device is, and where it's located. The discovered information is then merged into a common configuration management database such as the CMDB application.

The CMDB application enables other business applications to use the discovered information to support various business needs.

Discovery with Software Asset Management



ServiceNow platform's identification and reconciliation engine (IRE) framework enables all third-party data integrations with the CMDB application.

IRE provides a centralized framework where you can perform reconciliations and de-duplication of the data when multiple sources are ingesting data at the same time. IRE uses identification rules, reconciliation rules, and IRE data source rules to process the incoming data and then inserts the data into the corresponding CMDB tables. You can extend these rules to insert the data into tables that extend the CMDB core tables such as the Software Asset Management tables. There are two types of identification rules for IRE:

- Independent: If the **Independent** check box is selected on a CI identifier, it means that the CI is not dependent on any other CI.
- Dependent: If the **Independent** check box is not selected on a CI identifier, it implies that this CI is dependent on other CIs.

For more information on IRE, see Identification and Reconciliation Engine.

You should have already configured loading the CIs in the ServiceNow instance. For each CI in your environment, the Hardware [cmdb_ci_hardware] table has a corresponding CI identifier rule. When the third-party discovery application runs, the software is identified on CIs. The third-party application constructs a payload and sends the payload via the IRE REST API endpoint to the ServiceNow instance to insert or update data into the Software Asset Management tables.

A generic payload is used for creating installed software records. For Oracle, VMware, and Citrix, specific payloads feed additional publisher-specific data apart from software installations.

If multiple discovery sources are enabled and if the key details of the software, such as the display name and the version for all discovery sources, match, the Installation record is overwritten. If multiple discovery sources identify the same software with different field values,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

an entry is created in the Software Installation [cmdb_sam_sw_install] table. When the schedule job *SAM- Deduplication install table* runs and if all the normalized values of these installations match, only one record is set to active. The rest of the records are marked as inactive.

Domain separation is supported for third-party discovery with SAM with the following considerations:

- The IRE REST API stamps the domain that you are logged in to when the REST call is made.
- Log in to the domain where the CI resides and from where you run the payload.
- Don't log in to the parent domain. Being logged in the parent domain updates the existing CI and also creates a new CI in the parent domain.
- Send the payload from the same domain where the CIs reside. For example, if you send a payload from Domain A and if the payload has CIs that belong to Domain B, a new CI gets created in Domain A.

Use Software Asset Management with Governance, Risk, and Compliance

Use the Software Asset Management application in conjunction with the Governance, Risk, and Compliance suite of applications to holistically work on compliance, risk, and regulatory aspects.

IT asset management directly feeds critical information required by GRC programs to monitor cyber security measures such as CIS controls from The Center for Internet Security™ to enhance the overall security preparedness and cyber defense posture. For example, CIS controls 2.2, 2.4 require that organizations keep an inventory of all software assets and ensure that they are supported by the vendor. This information is automatically collected and surfaced on the CIS control indicate template from GRC.

For detailed information on Cybersecurity Control Accelerators and regulations such as CIS controls, ISO 27001, 27002, see Cybersecurity Controls Accelerators.

Using Software Asset Management with Agent Client Collector

Use the Agent Client Collector application to collect software inventory and usage data for the Software Asset Management application.

An agent is useful in discovering software deployed on end user machines such as laptops as well as machines deployed on isolated networks that only allow outgoing data transmission. You do not need to keep track of login credentials or IP ranges, nor do you need to create a discovery schedule. The agent, along with other software, can be deployed via a deployment image and then it continuously performs discovery and sends data back to your ServiceNow instance. For more details on the Agent Client Collector application, see Agent Client Collector.

You can download the Agent Client Collector application from the ServiceNow Store.

Use Software Asset Management and Application Portfolio Management to manage technology onboarding

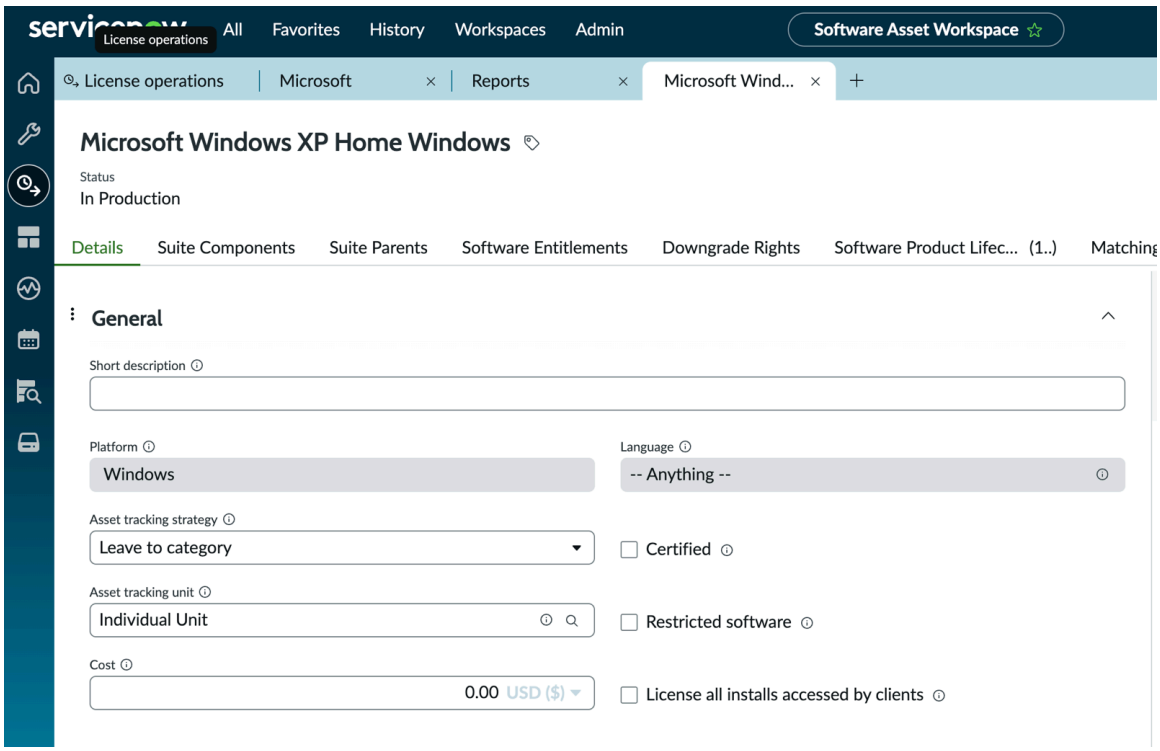
Use the Software Asset Management application along with Technology Reference Model (TRM) of Application Portfolio Management to manage onboarding of technologies.

TRM is a list of software products with information on their approval of use. Each product is associated with a set of lifecycle phases with a start and end date. The TRM library is maintained by the enterprise architect and used by application owners. For detailed information on TRM, see .

The Software Asset Management application gives visibility into the TRM lifecycle phases for all products associated with software models. When a software model is created and associated with a product that is approved for use in TRM, the **Certified** check box in the software model

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

form is selected by default. All software models associated with that product are then available for use.



If the same product in TRM is later marked as unapproved, the existing software models associated with that product don't reflect that change. However, when you open the existing software models, a banner appears stating `This software is not approved for use in the Technology Reference Model (TRM). To be in sync with the TRM, set the Certified flag to FALSE.`.

If a new software model is created with this product, that software model is marked as unapproved, and a banner isn't displayed as this software model is in sync with TRM.

If a product is marked as unapproved in TRM, reclamation candidates are automatically created for all software installations that are associated with that product. After the product is approved for use in TRM, the existing reclamation candidates are either marked **Closed complete** or **Closed canceled**.

Software Asset Management and TRM use case

This section describes a use case that demonstrates how the Software Asset Management application and TRM interact.

For example, you create a software model SW1, on September 15, 2022, and associate it with PostgreSQL, which is an unapproved product in TRM. By default, the **Certified** check box in the SW1 form is set to false and the **Restricted software** check box is set to true. Also removal candidates are created for any installations discovered.

On September 18, 2022, release 14.5 of PostgreSQL gets approved for use in TRM. If you now open SW1 a banner appears stating the following `This software is approved for use in the Technology Reference Model (TRM). To be in sync with the TRM, set the Certified flag as true`. However software models with older versions would continue to be restricted.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you create another software model SW2, on September 19, 2022, and associate it with PostgreSQL, the **Certified** check box is set to true and the **Restricted software** check box is set to false in the SW2 form.

Guided Experience for Lifecycle Reporting

Use a guided walk-through playbook to achieve audit readiness and regulatory compliance through accurate lifecycle reporting.

Overview of Guided Experience for Lifecycle reporting playbook

The Lifecycle Reporting playbook lets you create a lifecycle report tailored to your specific needs and requirements.

Accurate lifecycle data reporting is critical for organizational compliance. This playbook walks SAM managers through the organization's current lifecycle coverage and identifies any gaps, errors, or additional improvements to improve coverage.

The playbook guides you through every step of the lifecycle reporting process:

1. Defines your scope: Accurately establishes your lifecycle reporting boundaries to ensure complete coverage.
2. Identifies gaps: Conducts a thorough review of your current lifecycle coverage and identifies errors, omissions, or areas for improvement.
3. Helps you take action: Receive clear guidance on remediation steps to address any identified issues.
4. Achieves compliance: Build confidence that your lifecycle reports meet audit and regulatory requirements.

Benefits of Guided Experience for Lifecycle Reporting playbook

- Guided workflow: Step-by-step experience guiding you through various activities and tasks that need to be performed for a comprehensive lifecycle report. Navigate through preparation, content engagement, tool usage, and report finalization via a step-by-step guidance
- Aggregation of all available tools and capabilities in an optimized, logical order, ensuring an end-to-end workflow: software lifecycle report, approximated lifecycle, calculated lifecycle with lifecycle averages, custom lifecycle, parent-child relationship, and Content Service.
- Creation of success goals and tasks with appropriate owners to track your progress and contribute to a complete lifecycle report.
- An integral part of the Software Asset Workspace.

Accessing the Guided Experience for Lifecycle playbook

You can access the playbook by navigating to **Workspaces** > **Software Asset Workspace** > **Software asset analytics** > **Lifecycle management**. For more details, see Create a comprehensive lifecycle report using a guided experience.

Software Asset Management Guided Experiences

The Software Asset Management Guided Experiences application provides step-by-step guidance for completing tasks in your daily software management activities.

Entitlement Playbook overview

A playbook takes a workflow and breaks it into multiple lanes. Each lane includes:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

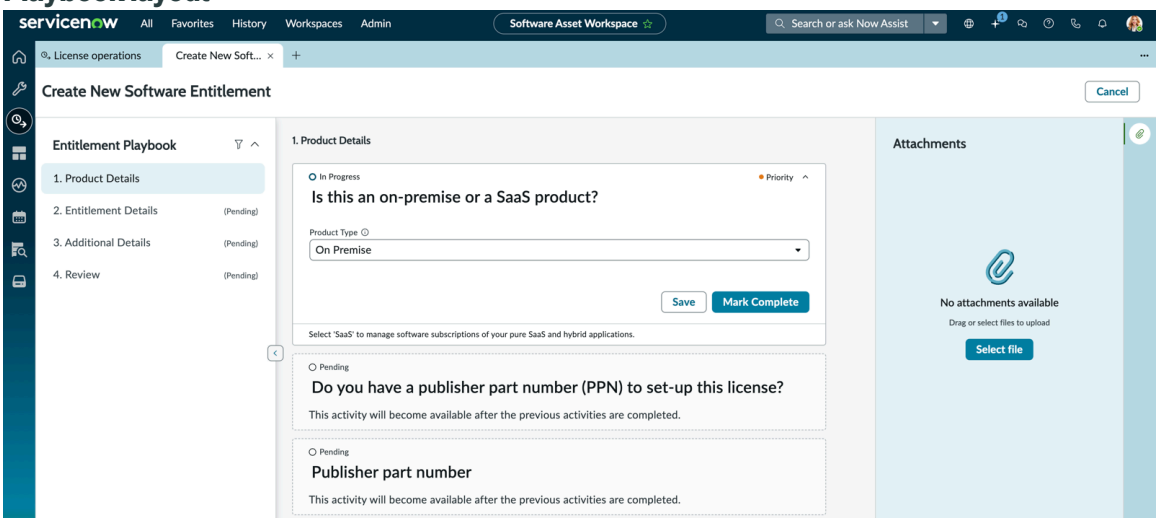
- A list of tasks that you must perform.
- Status indicators that display the current state of each task.
- Check boxes that indicate where you are in the workflow.

As you mark a task complete in a lane, you move to the next task. You can save a task at any time and return to the playbook later. After you complete all the tasks in a lane, you can move to the next lane. As you keep completing tasks and lanes, the status keeps getting reflected in the side panel. An activity log on the playbook shows all the data that you've entered for each task. After you complete all the tasks, you're asked to review the details you entered in all the lanes. You can choose to edit any field or select **Finish** to complete the process of creating the entitlement.

A playbook is divided into three parts:

- task lanes
- a work area
- an activity log

Playbook layout



Using playbook to set up entitlements

You can use the guided walk-through playbook for setting up entitlements. The guided walk-through playbook takes you step by step through each stage of the entitlement creation process, from initiation to completion.

To access the Entitlement playbook, you must install it from the ServiceNow Store and then access the playbook from the landing page on the Software Asset Workspace.

Using Guided Setup

Guided Setup provides a sequence of tasks that help you configure the following products or applications on your ServiceNow instance:

Software Asset Management Guided Setup

1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success portal**.
2. Select the **Product Setups** tab.
3. Select **Set up product**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. In the Set up product dialog box, select **SaaS** or **On-premise** from the **Setup type** drop-down list.
   - For SaaS, select the SaaS application that you want to set up in the **Integration profile** field.
   - For On-premise, select the Publisher and Product.
5. Select **Next**.

Microsoft SQL Server Guided Setup

Note: Only one instance of Microsoft SQL Server setup can run at a time.

1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success portal**.
2. Select the **Product Setups** tab.
3. On the Product Setups page, launch the Guided Setup by selecting **Get Started** on the Microsoft SQL Server tile.

Microsoft Windows Server Guided Setup

Note: Only one instance of Microsoft Windows Server setup can run at a time.

1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success portal**.
2. Select the **Product Setups** tab.
3. On the Product Setups page, launch the Guided Setup by selecting **Get Started** on the Microsoft Windows Server tile.

Microsoft 365 Guided Setup

Navigate to the Microsoft 365 Guided Setup by either of the following ways:

- Option 1
  1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success portal** > **Product Setups**.
  2. Select the **Product Setups** tab.
  3. On the Product Setups page, launch the Guided Setup by selecting **Get Started** on the Microsoft 365 tile.
- Option 2
  1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success portal**.
  2. Select the **Product Setups** tab.
  3. Select **Set up product**.
  4. In the Set up product dialog box, select **SaaS** from the **Setup type** drop-down list.
  5. Select **Microsoft 365** in the **Integration profile** field.
  6. Select **Next**.

Adobe Cloud Guided Setup

You can use the Adobe Cloud Guided Setup to integrate your Software Asset Management application with Adobe Cloud to manage license compliance and optimization. For details, see Adobe Cloud Guided Setup.

Navigate to the Adobe Cloud Guided Setup using either of the following ways:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Option 1
  1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success portal** > **Product Setups**.
  2. Select the **Product Setups** tab.
  3. On the Product Setups page, launch the Guided Setup by selecting **Get Started** on the Adobe Cloud tile.
- Option 2
  1. Navigate to **Workspaces** > **Software Asset Workspace** > **Success portal**.
  2. Select the **Product Setups** tab.
  3. Select **Set up product**.
  4. In the Set up product dialog box, select **SaaS** from the **Setup type** drop-down list.
  5. In the **Integration profile** field, select **Adobe Cloud**.
  6. Select **Next**.

> **Important:** You must complete the required tasks in the Guided Setup to move to the next task.

Related topics

Software Asset Management publisher pack for Microsoft

Integrate with SaaS applications

Software Asset Management publisher pack for Adobe

Use Software Asset Management with Contract Management Pro

Leverage advanced contract life cycle capabilities after a contract has been signed using the Obligation Management (sn_cm_obligation) and the ServiceNow Otto for Contract Management Pro (sn_cm_gen_ai) plugin.

https://player.vimeo.com/video/1217937813?h=3ff1c6527d&badge=0&autopause=0&player_id=0&app_id=58479

Integrating the Software Asset Management and Contract Management Pro applications provides access to the following post-signature contract data and workflows within the Software Asset Workspace:

- **Obligation Management:** Use the Contract Management Pro application's Obligation Management feature within the Software Asset Workspace. If you have the required roles assigned, you can create an obligation record. This record defines specific instructions and obligation tasks required to fulfill the contract obligation. For more information about the Contract Management Pro application's Obligation Management feature, see Obligation Management. For more information about creating and managing obligation tasks in the Software Asset Workspace, see Manage obligation tasks in the Software Asset Workspace.
- **Renewal Management:** Receive proactive notifications and actionable insights regarding upcoming contract renewals.
- **Metadata and obligation extraction:** Streamline contract management by extracting the key contract metadata and obligations from an uploaded signed contract document using the manage contract repository agentic workflow. You must install the ServiceNow Otto for Contract Management Pro (sn_cm_gen_ai) plugin. You must also activate the generative AI skills to use the manage contract repository agentic workflow. For more information about installing the plugin and enabling the skills, see Configure the manage contract repository

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

agentic workflow for Software Asset Management. For more information about extracting the key contract metadata and obligations from assigned contract, see Use manage contract repository agentic workflow in the Software Asset Workspace.

Roles required for Software Asset Management and Contract Management Pro better together feature

With the Software Asset Management integration for Obligation Management (sn_cm_obligation) plugin, the required roles are available. The Software Asset Management admin has to assign the roles to the required users.

Roles required

Role	Description
sn_cm_obligation.obligation_admin	Provides administrative access to Obligation management and underlying data.
sn_cm_obligation.obligation_fulfiller	Creates obligations and approves, rejects, or cancels obligation tasks within the Software Asset Workspace.
sn_cm_obligation.obligation_user	Acts on the assigned obligation task and submits the task within Software Asset Workspace.
sn_cm_gen_ai.ai_contract_fulfiller	Extracts the information from a signed contract to add it to the software contract.
sn_cm_gen_ai.ai_contract_config	Activates or deactivates the Contract obligation extraction and Contract metadata extraction skills.
now_assist_panel_user	Accesses the ServiceNow Otto panel to activate or deactivate the skills.
sn_cm_gen_ai.ai_contract_admin	Provides administrative access to the manage contract repository agentic workflow. Installs ServiceNow Otto for Contract Management Pro (sn_cm_gen_ai) plugin and activates the required skills.

Plugins required for the Software Asset Management and Contract Management Pro better together feature

The following plugins are required to use the Software Asset Management and Contract Management Pro better together feature:

- Obligation Management (sn_cm_obligation)
- ServiceNow Otto for Contract Management Pro (sn_cm_gen_ai)

Related topics

Manage obligation tasks in the Software Asset Workspace

Configure the manage contract repository agentic workflow for Software Asset Management

Use manage contract repository agentic workflow in the Software Asset Workspace

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Consumption rule evaluation

Consumption rules control which installations or users can consume a license. After you link a consumption rule to an entitlement, the license metric type determines how the system evaluates the rule during allocation.

Consumption rules restrict license consumption to specific organizational entities, such as a company, cost center, department, or country. You use consumption rules to allocate licenses to particular groups or locations within your organization. For example, a consumption rule could limit a license to users in the Finance department or devices in a specific company.

After you create consumption rules, you must link them to entitlements. When the system allocates a license, it evaluates each software installation against the linked consumption rule to determine whether that installation can consume a license from the entitlement.

The field that the system evaluates depends on the license metric allocation type configured on the entitlement. The system reads this field from the Software Installation [cmdb_sam_sw_install] table.

Field evaluated by license metric allocation type

License metric allocation type	Field evaluated on the Software Installation record
Device-based (for example, Per Core or Per Device)	Installed on
User-based (for example, Per User or User Subscription)	Assigned to

The license metric on the linked entitlement determines which field the system evaluates, regardless of the consumption rule values you set such as country, company, or cost center.

Evaluation scenarios

Per Device evaluation scenario

An entitlement uses the Per Device license metric and is linked to a consumption rule that specifies a company. When a software installation attempts to consume a license from this entitlement, the system checks the device's company. That device is the one referenced in the **Installed on** field of the Software Installation record.

If the device's company matches the consumption rule's company, the installation can consume a license from the entitlement. If it doesn't match, the installation can't consume against that entitlement.

Per User evaluation scenario

An entitlement uses the Per User license metric and is linked to a consumption rule that specifies a department. When a software installation attempts to consume a license from this entitlement, the system checks the user's department. That user is the one referenced in the **Assigned to** field of the Software Installation record.

If the user's department matches the consumption rule's department, the installation can consume a license from the entitlement. If it doesn't match, the installation can't consume against that entitlement.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

- Create consumption rules
- Link consumption rules to entitlements

Configuring Software Asset Management

Install and configure the Software Asset Management application to manage your software inventory, track licenses, and support compliance workflows.

Configuration overview

The following table provides an overview of the process for configuring Software Asset Management.

Configure Software Asset Management

Step	Action	Resource
Install Software Asset Management	Get the Software Asset Management application from the ServiceNow Store or Install Software Asset Management from the Product Hub.	Software Asset Management installation methods
Use Software Asset Management	Use Software Asset Management to track licenses, monitor compliance, and identify optimization opportunities.	Using Software Asset Workspace

Related configuration tasks

Depending on your environment, the following optional tasks might be required:

Overwrite customizations for Software Asset Management migration

If you are migrating from an earlier version of Software Asset Management and need to overwrite existing customizations, see Overwrite customizations for Software Asset Management migration.

Configure SCCM for Software Asset Management

If your organization uses Microsoft SCCM as a discovery source for software installations, see Configure SCCM for Software Asset Management.

Software Asset Management installation methods

Install the Software Asset Management application from Product Hub or ServiceNow Store.

Before you can use Software Asset Management capabilities, you must install the application on your ServiceNow instance.

Installation methods

Choose an installation method based on your needs:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Installation methods

Method	When to use
Product Hub	You are installing the SAM application for the first time and want a guided installation experience. Product Hub installs your entitled application and displays additional applications and plugins available for your subscription tier.
ServiceNow Store	You are installing the SAM application without using the guided Product Hub experience, or your instance does not have the Setup Hub (sn_ia_base) or ServiceNow Otto for Setup (sn_ia) application installed.

Related topics

- Install Software Asset Management from the Product Hub
- Request Software Asset Management

Product Hub for Software Asset Management

The Product Hub provides a guided installation and management interface for the Software Asset Management application. Administrators can install the application, apply default configurations, track progress, and access the Configuration Console from the Software Asset Management Admin Home tile.

Purpose and access

The Product Hub gives an administrator a single starting point to install Software Asset Management, apply the default configurations, and open the Configuration Console after the install completes. Product Hub is accessible from the Admin Home page through the **Software Asset Management** tile in the **Manage your products** section.

From the Admin Home page, the Software Asset Management tile is available only when the application matching your subscription is installed on your instance.

Important: The Software Asset Management tile is available only when the ServiceNow Otto for Setup (sn_ia) application for AI Native subscriptions, or the Setup Hub (sn_ia_base) application for non-AI Native subscriptions, is installed on your ServiceNow® instance.

Access to Product Hub requires one of two granular roles, which a system administrator must grant:

Roles to access Product Hub

Role	Access level
sn_ia_config.ia_admin	Full access: install, update, and manage Software Asset Management applications and plugins
sn_ia_config.ia_user	View-only access: browse Product Hub but can't install applications

Note: System administrators have access to Product hub by default. A system administrator must grant sn_ia_config.ia_admin or sn_ia_config.ia_user role to other users based on the access level required.

Choose an install option

When you first open the Product Hub, two install options are available. Choose the option that matches the state of your instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Start setup

Use this option to install the Software Asset Management application on a new instance. The Product Hub installs the core application, installs the dependent applications and plugins, and applies the default configurations.

Upload update set

Use this option to move an existing setup from another instance. Upload the batch update set as an XML file, preview the changes in a new tab, and commit the batch. The Product Hub finishes the install using the uploaded configuration.

Track progress and manage components

The tile status label on Admin Home reflects the current stage of the setup and moves through three states:

Ready to install

The label shown before the install starts. The core application isn't installed on your instance.

Installation in progress

The label shown while the guided flow runs. The Product Hub installs the core application and its dependent components.

Ready to configure

The label shown after the core install completes and the default configurations are applied. The Product Hub landing page changes to a manage view.

The Manage view provides two elements for the post-install phase:

Configure card

Opens the Configuration Console so an administrator can complete the remaining configuration items. For details, see Configuration Console for Software Asset Management.

Installation progress panel

Lists the applications and plugins grouped with Software Asset Management, sorted across three tabs: **Not installed**, **Installed**, and **Updates available**. Use the tabs to install remaining components, review installed components, or apply available updates.

Related topics

Software Asset Management installation methods

Install Software Asset Management from the Product Hub

Configuration Console for Software Asset Management

Install Software Asset Management from the Product Hub

Install Software Asset Management and its dependent applications and plugins from using Product Hub. The Product Hub applies the default configurations and prepares your instance for the Configuration Console.

Before you begin

Check your entitlements to determine whether you have access to the Software Asset Management application.

Install the application matching your subscription from the ServiceNow Store:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- ServiceNow Otto for Setup (sn_ia) — for AI Native subscriptions
- Setup Hub (sn_ia_base) — for non-AI Native subscriptions

Role required: admin or sn_ia_config.ia_admin

About this task

Use this procedure the first time you install the Software Asset Management application on your instance. If the Software Asset Management application is already installed, the Product Hub page does not display the setup option and instead displays the manage view for reviewing components and applying updates.

Procedure

1. Navigate to **Admin** > **Admin Home**.
   The Admin Home page opens automatically when you log in to your ServiceNow instance.
2. In the **Manage your products** section of the Admin Home page, select the Software Asset Management card to open the Product Hub.
3. Choose the install option that fits your instance.
   - To install on a new instance, select **Start setup**. The Product Hub installs the core application and the dependent components and applies the default configurations.
   - To move an existing setup from another instance, select **Upload update set**. Upload the batch update set as an XML file, preview the changes in a new tab, and commit the batch.
4. Follow the guided flow through **Choose what to install in this app bundle**, **Apply default configurations**, and **Ready to configure**.
   The Product Hub tracks progress on each step. For a visual walkthrough of the guided flow, see the Product Hub installation video or workflow diagram.

Result

- The Software Asset Management application is installed and appears in the **Installed** tab.
- The additional applications and plugins included in your subscription tier appear in the **Not installed** tab.
- The **Configure** card that opens the Configuration Console appears.

What to do next

After you install Software Asset Management from the Product Hub, complete the following steps to access the Configuration Console:

1. Install the SAM Admin Experience - v1.0 (sn_samp_admin) store application from ServiceNow store. This application is required to access the Configuration Console.
2. Select **Configure** on the Admin Home page for Software Asset Management to open the Configuration Console. For details, see Configuration Console for Software Asset Management.

Related topics

Software Asset Management installation methods

Product Hub for Software Asset Management

Configuration Console for Software Asset Management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configuration Console for Software Asset Management

Use the Configuration Console to configure Software Asset Management after installation. Complete platform-level settings, configure key items with AI assistance, and package configurations for deployment to other instances.

Note: To access the Configuration Console for Software Asset Management, you must have the sam_admin and sn_ia_config.ia_user roles.

The Configuration Console for Software Asset Management groups configuration items under the following three categories:

- Software foundations
- Governance
- Data management

From the console, you can:

- Track configuration progress on the Configuration Summary page.
- Complete platform-level settings such as content jobs, properties, and scheduled jobs.
- Use AI assistance to configure items such as Content service setup, Groups, and Users.
- Package configuration changes into an update set and download it to deploy to another instance.

Note: AI-assisted configuration provides suggestions based on your instance data and may not be accurate. Review and validate all AI-generated configurations before applying them to verify they meet your organization's requirements.

Related topics

Configuration Console overview

Configure Software Asset Management using the Configuration Console

Monitoring content job progress

Configure scheduled jobs in the Configuration Console

Configuration Console overview

The Configuration Console organizes configuration items, tracks setup progress, and offers shortcuts to reduce manual effort.

Configuration Summary page

The Configuration Summary page is the landing page of the Configuration Console. The page has two main areas:

Setup status

Displays a tile for each of the three configuration categories with the count of items configured and the total items in that category. From each tile, select **Get Started** to open the first item in that category.

Configuration activity

Displays the configuration changes that have been recorded on this instance. Use the **Configured items** tab to review individual items that have been marked as configured. Use the **Completed batches** tab to review changes that have been grouped into completed batched update sets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reuse and AI-assisted configuration

The console header offers two shortcuts and the item-by-item workflow. Package a completed configuration for reuse on another instance, or use AI to configure supported items.

Package and download

Group completed configuration changes into a batched update set and download it. Reuse the update set to apply the same configuration on another instance without redoing the manual work.

Configure with AI

Open ServiceNow Otto to configure supported items with AI assistance. Configure with AI is available for Content Service setup, Groups, and Users.

Configuration Console modules

The Configuration Console modules for Software Asset Management [Configuration Console modules for Software Asset Management] table lists every module that remains after installation, grouped by category. Each row includes a description, a reference link, and the roles required to access the module. To configure a module, select it in the Configuration Console, or enter its name in **Search configurations** to find it. Configure the settings, and select **Mark as configured** to update the setup progress on the Configuration Summary page.

Configuration Console modules for Software Asset Management

Category	Configuration items	Description	Roles required	Reference
Software foundations	Override customizations	Resolve conflicts between customizations and the default components of Software Asset Management to keep forms, scripts, UI policies, and business rules upgrade-ready.	admin	See Revert Software Asset Management customizations.
	Content job progress	Track the first-time run of the content jobs that load the software content library data supporting Software Asset Management features.	cds_client_admin	See Monitoring content job progress.
	Content Service setup	Opt in to the Software Asset Management Content Service to share unnormalized software installation data from your organization with ServiceNow® to improve the normalization process.	• sam_admin • sn_ia_config.ia_user	See Configure Content Service setup using AI.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configuration Console modules for Software Asset Management (continued)

Category	Configuration items	Description	Roles required	Reference
	Properties	Configure the properties that influence how reconciliation, software models, normalization, and publisher-specific rules run. The console groups these properties under Reconciliation, Software model, Normalization, Publisher, and Other.	admin	See Software Asset Management properties.
	Otto skills	Enable and customize the preconfigured AI skills that automate the Software Asset Management workflows. **Note:** This module appears only when ServiceNow Otto for Software Asset Management (SAM) is installed.		See Generative AI skills in ServiceNow Otto for Software Asset Management (SAM).
	Migrate software installations	Migrate CMDB software installations to the Software Asset Management Software installations [samp_m2m_candidate_install] table.	• sam_admin • sn_ia_config.ia_user	See Migrate software installations.
Governance	Scheduled jobs	View, create, and export the scheduled jobs that automate recurring Software Asset Management processes such as normalization and reconciliation.	system_scheduler_admin	See Configure scheduled jobs in the Configuration Console.
	Groups	Create groups and assign users and roles that manage Software Asset Management operations and notifications.	admin	See Configure groups and users using AI.
	Users	Import users and assign roles that establish access and capabilities		

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configuration Console modules for Software Asset Management (continued)

Category	Configuration items	Description	Roles required	Reference
		across Software Asset Management.		
Data management	SSO	Configure the SSO integration for Software Asset Management.	• sam_admin • sn_ia_config.ia_user	See SSO integration in Configuration Console.
	Direct connection	Configure the direct connection integration for Software Asset Management.		See Direct connection integration in Configuration Console.

Related topics

Configuration Console for Software Asset Management

Configure Software Asset Management using the Configuration Console

Configure Software Asset Management to manage software licenses, compliance, integrations, and team setup from Configuration Console.

Before you begin

- Install the Software Asset Management application. See Install Software Asset Management from the Product Hub.
- Install the SAM Admin Experience - v1.0 (sn_samp_admin) application from theServiceNow Store. Without this application, the Configuration Console is not available.

Role required: To access the Configuration Console, you must have the sam_admin and ia_user roles.

Individual modules may require additional roles. For role requirements by module, see the Configuration Console modules for Software Asset Management table in Configuration Console overview.

About this task

The Configuration Console organizes Software Asset Management setup into independent modules. Configure modules and setup items in any order. The Setup status section tracks overall progress.

Note: Setup items appear based on installed applications. If a dependent application is not installed, related setup items are hidden.

Procedure

1. Navigate to **Admin** > **Admin Home**.
2. In the **Manage your products** section, select the Software Asset Management tile.
   The Product Hub opens.
3. In the Configure your product section, select **Configure**.

Tip: To find a specific setup item, enter a keyword in the **Search configurations** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Select a module to configure.
   - In the Configuration Summary navigation menu, select a module.
   - In the Setup status section, select **Get started** on a module card.

   Configure modules and setup items in any order.
5. Complete the setup items in the module.
6. After completing a setup item, select **Mark as configured**.

   Tip: You can change the configuration status of any item at any time.
7. Review the **Setup status** section to confirm overall progress.
8. **Optional:** To bundle configuration changes for deployment, select **Package and download**. The update set downloads as an `.xml` file.

Result

Configured items show a completed status. Progress cards update as you mark items configured. The system typically captures your changes in an update set that you can apply to other instances.

What to do next

To replicate a configuration from another instance, upload an existing update set on the Product Hub page. You can upload one `.xml` file at a time.

Configure Software Asset Management using AI

Use the AI conversational experience to configure Content service setup, groups, and users in the Configuration Console as a guided alternative to manual configuration.

The AI assistant guides you to configure the following three items in the Configuration Console for Software Asset Management:

- Content service setup
- Groups
- Users

Items that AI can configure display an Otto automation available badge on the item page. Complete the remaining items manually. For the full list of configuration items and reference links, see Configuration Console overview.

AI-guided configuration suits standard setups where you want suggested values based on your instance data. Manual configuration remains available for items that require custom values or that the AI assistant does not support.

When you select **Configure with AI** in the console header, the AI assistant opens as a side panel and suggests values for each configuration option based on your instance data. You can accept the suggestions, choose alternatives, or skip steps. After completing the AI-guided configuration, select **Mark as configured** on the item page. The item's status updates on the Configuration Console, and you can proceed to the next item.

Related topics

Configure Content Service setup using AI

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure Content Service setup using AI

Use the AI conversational experience to opt in to the Software Asset Management Content Service. The AI conversational experience walks you through the opt-in decision, the software asset data types that you share with ServiceNow, and the confirmation of your choices.

Before you begin

- The Software Asset Management application must be installed on your ServiceNow instance. For details, see Install Software Asset Management from the Product Hub.
- The ServiceNow Otto for Software Asset Management (SAM) application must be installed on your ServiceNow instance. For details, see Install ServiceNow Otto for Software Asset Management (SAM).
- The ServiceNow Otto panel must be enabled on your ServiceNow instance. For details, see Enable the ServiceNow Otto panel (Next Experience UI).
- AI Search must be activated on your ServiceNow instance. For details, see the AI Search activation steps in Install ServiceNow Otto for Software Asset Management (SAM).

Role required: sam_admin and sn_ia_config.ia_user

About this task

The Content Service setup item helps your organization share raw software installation data with ServiceNow®. In return, the Content Service supplies updates to the Normalization Library so that your instance receives improved normalization and content coverage.

Procedure

1. Navigate to **Admin** > **Admin Home**.
2. In the **Manage your products** section of the Admin Home page, select the **Software Asset Management** tile to open the Product Hub.
3. In the Configure your product section, select **Configure**.
4. Navigate to **Software foundations** > **Content service setup**.
   The Content service setup page opens with the **Otto automation available** badge.
5. Select **Configure with AI** in the header of the Configuration Console.
   ServiceNow Otto opens as a side panel and starts the Otto-guided flow for Content service setup.
6. Review the summary of the Software Asset Management Content Service in ServiceNow Otto and to opt in and select **Yes**.
   ServiceNow Otto opts your company in to the Content Service and lists the default software asset data types.
7. Select one of the following options for the additional services.
   - **Accept all**: Opt in to all the additional services.
   - **Skip**: Skip all the additional services.
   - Select the individual service name to opt in that specific service.
8. When the AI assistant asks whether to mark the step as configured, select one of the following options:
   - **Mark as configured**: Mark the step as complete immediately.
   - **Mark later**: Mark the step as complete later and return to the Configuration Console to complete this action manually.

   The Configuration Summary page updates the setup status to reflect the completed item.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Configure Software Asset Management using AI

Configure groups and users using AI

Use the AI conversational experience in the Configuration Console to configure groups and users for Software Asset Management. This approach allows you to complete multiple setup tasks through a single interface without navigating to individual modules.

Before you begin

- The Software Asset Management application must be installed on your ServiceNow instance. For details, see Install Software Asset Management from the Product Hub.
- The ServiceNow Otto for Software Asset Management (SAM) application must be installed on your ServiceNow instance. For details, see Install ServiceNow Otto for Software Asset Management (SAM).
- The ServiceNow Otto panel must be enabled on your ServiceNow instance. For details, see Enable the ServiceNow Otto panel (Next Experience UI).
- AI Search must be activated on your ServiceNow instance. For details, see the AI Search activation steps in Install ServiceNow Otto for Software Asset Management (SAM).

Role required: admin

About this task

Groups organize the users that are responsible for day-to-day Software Asset Management operations and receive the notifications that support those operations. The Users page sets up the users who work with Software Asset Management and assigns the roles that establish their access and capabilities. The Configuration Console includes a **Configure with AI** option that opens a conversational interface. You can use this interface to complete the following setup tasks without navigating to individual modules:

- Configure groups and roles
- Import users into your ServiceNow instance

Procedure

1. Navigate to **Admin** > **Admin Home**.
2. In the **Manage your products** section of the Admin Home page, select the **Software Asset Management** card to open the Product Hub.
3. In the Configure your product section, select **Configure**.
   The Configure Software Asset Management page opens in the Configuration Console.
4. Select **Configure with AI**.
   The ServiceNow Otto panel opens and displays the estimated time to complete the full configuration process.
5. Select the task that you want to complete.
   - To configure groups, assign users, assign roles, or search by org chart, select **Start with Assignment groups (Team management)**.
   - To view all available options, including groups, users, and roles, select **Choose something else**.
6. Follow the prompts in the panel based on your selection in the previous step.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you selected	Do this
Start with Assignment groups (Team management)	Select one of the following options or enter a natural-language prompt: ○ **Assign user(s) to a group** ○ **Assign user(s) to a role** ○ **Assign role(s) to a group** ○ **Create Group** ○ **Search by Org Chart**
Choose something else	Select **Groups (Team management)** or **Users (Team management)**, and then follow the prompts. For **Users (Team management)**, select a data source (File or LDAP) to import users into your ServiceNow instance.

7. Respond to the follow-up questions and provide any additional information requested in the panel.
8. Review the action summary and select the required action.
   - **Yes**: Confirm the action.
   - **Change details**: Modify the information you provided.
   - **Cancel**: Cancel the action.
9. When prompted for confirmation, select **Yes** to proceed or **No** to cancel.
10. Select one of the following options after the AI assistant displays a success message:

    The success message appears only when you select **Yes** in the previous step.

    - **Do something else**: Return to the task selection to complete another configuration.
    - **No further assistance**: End the conversation. The AI assistant then asks whether to mark the step as configured.
11. When the AI assistant asks whether to mark the step as configured, select one of the following options:
    - **Mark as configured**: Mark the step as complete immediately.
    - **Mark later**: Mark the step as complete later and return to the Configuration Console to complete this action manually.

Result

The AI assistant completes the requested configuration and creates or updates the relevant records in your instance. Group and user configuration changes appear in the Team management module of the Configuration Console.

SSO integration in Configuration Console

The SSO (Single Sign-On) module under the Software integrations module in the Configuration Console displays a tile for each supported SSO provider. Use these tiles to create SSO integration profiles that capture managed applications and their usage data for software asset tracking.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Access to the SSO module requires the sam_admin and sn_ia_config.ia_user roles. The module enables SAM admins to configure SSO provider integrations, review integration status, and track software usage data for connected SSO applications.

The following SSO providers are supported:

Microsoft Entra ID

Pulls SSO applications, users, groups, and group memberships from your Microsoft Entra ID tenant through the Microsoft Entra ID Spoke.

Note: The tile appears when the Software Asset Management - SaaS License Management and Microsoft Entra ID Spoke store applications are installed.

Okta

Pulls SSO applications, users, and groups from your Okta organization through the Okta Spoke.

Note: The tile appears when the Software Asset Management - SaaS License Management and Okta Spoke store applications are installed.

Tile actions

Each SSO tile displays one of the following actions based on the integration status:

Get started

Opens the Guided Setup for a tile with no existing integration profile. Use this action to configure the SSO provider for the first time.

Resume

Continues an in-progress guided setup that was started but not completed.

Review

Opens the Software Asset Workspace list view of integration profiles created for that provider.

Ways to create an SSO integration profile

The Configuration Console provides two entry points for creating an SSO integration profile:

- The **Get started** action on a provider tile, which launches the guided setup for that provider.
- The **New integration** button, followed by selection of a provider from the **Confirm integration type** drop-down list.

Both entry points open the **Create New SSO Integration Profile** form in the Software Asset Workspace. Enter the details required for the selected provider and submit the form to create the profile. The **Review** action on the tile then opens the list view of all profiles created for that provider, along with their current status.

Related topics

Integrate with SSO providers

Integrating with Microsoft Entra ID

Integrating with Okta

Integrate with SaaS applications

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Direct connection integration in Configuration Console

The Direct connection module under the Software integrations module in the Configuration Console displays tiles for supported SaaS providers. Use these tiles to create integration profiles that connect directly to SaaS portals and pull in user subscription, activity, and usage data for license management.

Access to the Direct connection module requires the sam_admin role. The module enables SAM admins to configure SaaS provider integrations, review integration status, and manage subscription and usage data for connected applications.

Note: When the Software Asset Management - SaaS License Management store application is installed, a default set of tiles such as Dropbox and DocuSign appears in the Direct connection module. Additional tiles appear based on the dependent store applications installed on your instance.

Tile actions

Each direct connection tile displays one of the following actions based on the integration status:

Get started

Opens the guided setup for a tile with no existing integration profile. Use this action to configure the SaaS provider for the first time.

Resume

Continues an in-progress guided setup that was started earlier but not completed.

Review

Opens the Software Asset Workspace list view of integration profiles created for that provider. The tile shows the count of draft or published profiles above the button.

Ways to create a direct connection integration profile

The Configuration Console provides two entry points for creating a direct connection integration profile:

- The **Get started** action on a provider tile, which launches the guided setup for that provider.
- The **New integration** button, followed by selection of a provider from the **Confirm integration type** drop-down list.

Both entry points launch the Guided Setup for the selected provider, which covers prerequisites, SaaS product setup, and success goal creation. After the profile is created, the **Review** action on the tile opens the list view of all profiles created for that provider, along with their current status.

Related topics

Integrate with SaaS applications

SaaS License Management

Monitoring content job progress

Track the first-time run of the content jobs that load the Software Asset Management Content Service data into your instance. View job status and completion details to confirm that the initial download completed and that delta runs are current.

Note: Access to the Content job progress module requires the cds_client_admin role.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About content jobs

Content jobs download software content from the ServiceNow® Content Service into your instance. This content includes publishers, products, versions, discovery models, normalization rules, product lifecycles, subscription product definitions, and related reference data. Software Asset Management uses this content to normalize discovered software, identify products, and support licensing and reconciliation.

When you configure the Software Asset Management application for the first time in the Configuration Console, the system schedules Software Asset Management specific content jobs. These jobs run a full pull of the Software Asset Management Content Service to populate your instance. After the first run completes, these jobs run twice a week to pull delta updates. Delta runs make new and updated content available in your instance.

Content job records are stored in the Data Services Schedule [cds_client_schedule] table.

What the page shows

The Content job progress page has two areas:

List view

Displays each content job with its target table, order, last updated timestamp, and run frequency. The list view reflects the status of both the first-time run and subsequent delta runs.

Job status panel

Displays the progress of the first-time run only, grouped under **Completed** and **Scheduled** tabs. As each job finishes the first-time run, it moves from **Scheduled** to **Completed**. The panel does not refresh for delta runs. To review delta run status, use the list view.

When to use this page

- Confirm that the initial content download completed after setting up the Software Asset Management application.
- Review the last updated timestamp for a specific content job to verify that delta runs are current.
- Identify a content job that has not run as expected before contacting support.

Related topics

Content updates for Software Asset Management

Configure scheduled jobs in the Configuration Console

Automate recurring SAM processes such as normalization, reconciliation, and cleanup operations by configuring scheduled jobs in the Configuration Console.

Before you begin

Install the Software Asset Management application. For installation instructions, see Install Software Asset Management from the Product Hub.

Role required: system_scheduler_admin

About this task

The Configuration Console displays only jobs specific to Software Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. In the Configuration Console, navigate to **Governance** > **Scheduled jobs**.
   The Scheduled jobs page displays a pre-filtered list of Software Asset Management jobs.
2. Select a job name to view its details.
   Filter, sort, or group the list to locate a specific job. The list displays each job with its name, active state, class, and last updated timestamp.
3. **Optional:** To create a scheduled job for Software Asset Management, select **New**.
   a. In the **Name** field, enter a descriptive name for the job.
   b. Configure the schedule using the **Run**, **Time**, and **Time zone** fields.
   Specify the frequency (daily, weekly, monthly), time of day, and time zone.
   c. In the **Run as** field, enter the user account that runs the job.
   d. Select **Save**.
4. **Optional:** To export the list of scheduled jobs, select **Export**.
   a. From the **File Type** list, select the file type.
   b. Select the delivery method: **Download** or **Email**.
   c. Select **Export**.
5. To mark a step as configured, select **Mark as configured**.
   The Configuration Summary page updates the setup status to reflect the completed item.

Related topics

Configuration Console overview

Configuration Console for Software Asset Management

Request Software Asset Management

The ServiceNow® Software Asset Management Professional (com.snc.samp) plugin requires a separate subscription. This plugin includes demo data. Depending on your environment, you may choose to request one or more related plugins.

Before you begin

To purchase a subscription or load demo data after activation, contact your ServiceNow account manager. Within a few days, the account manager can activate the plugin and load any demo data on the production and non-production instances of your organization.

If you do not have an account manager, decide to delay activation until after your purchase, or want to evaluate the product on a non-production instance at no extra charge, you can use this procedure to submit a plugin activation request through the ServiceNow® Now Support Service Portal.

Warning: If you upgrade to the Software Asset Management Professional (com.snc.samp) plugin from the Software Asset Management plugin (com.snc.software_asset_management), then you cannot revert to the Software Asset Management plugin (com.snc.software_asset_management).

Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Depending on your environment, you can request related plugins with the Software Asset Management Professional (com.snc.samp) plugin. You can request the optional plugins through either the Now Support Service Portal or through the ServiceNow Store.

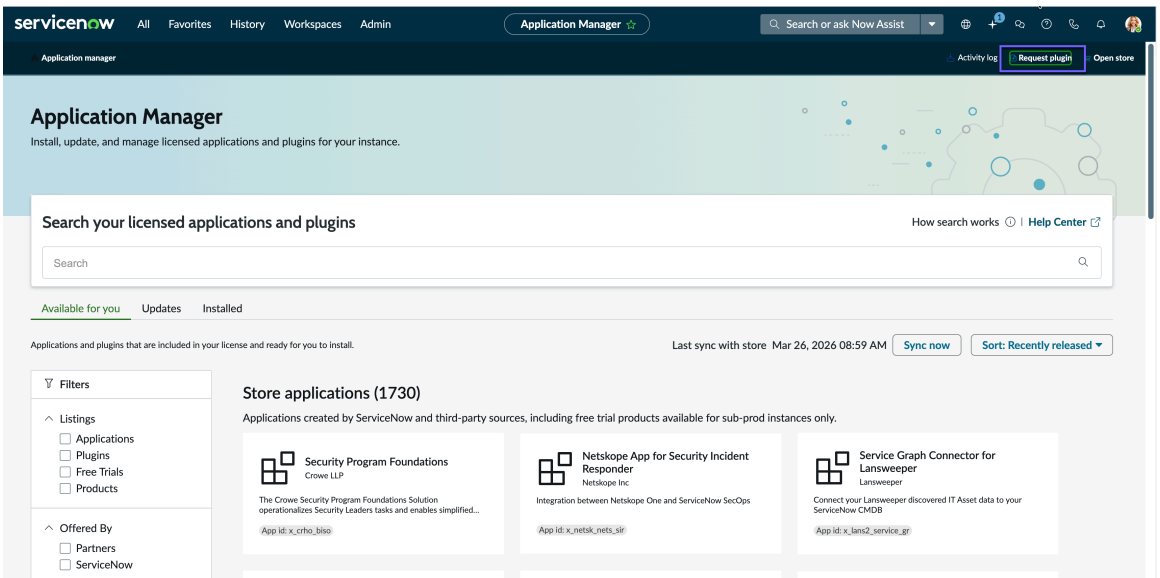
For the list of Software Asset Management Professional plugins, see Components installed with Software Asset Management Professional.

Only ServiceNow personnel can activate the Software Asset Management Professional (com.snc.samp) plugin and other related plugins. The plugins are not visible in the plugin list, even after activation.

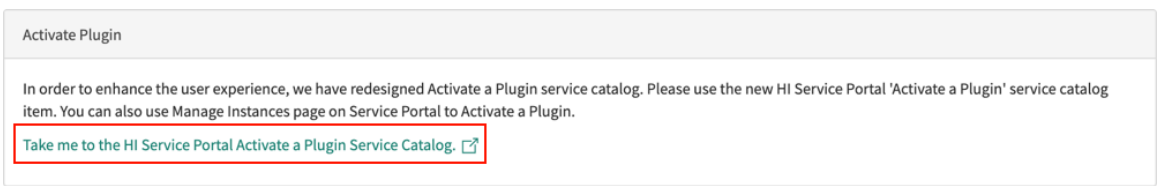
Warning: After installing the Software Asset Management application for the first time, or upgrading from the Basic Software Asset Management, you need to revert customizations for all features work. The Revert Customizations module in the Software Asset Management application can revert customized files related to Software Asset Management back to the base configurations that were skipped during the installation or upgrade process. See Revert Software Asset Management customizations

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. On the All Applications page, select **Request Plugin** to open the **Activate Plugin** form on Now Support.



3. On Now Support, select the link to access the Now Support Service Portal Service Catalog.



4. Select your instance.
5. Select **Actions > Activate Plugin**.
6. On the **Activate Plugin** form, provide the following information.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

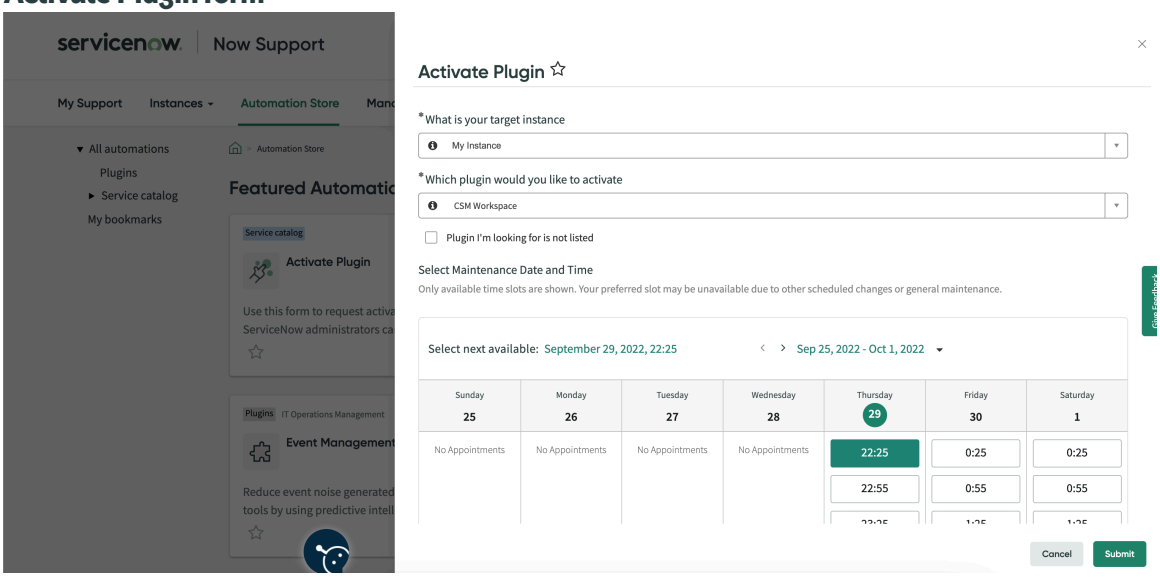
Activate Plugin form

Field	Description
What is your target instance	Instance on which to activate the plugin.
Which plugin would you like to activate	Name of the plugin to activate. **Note:** Select Software Asset Management Professional Master Workspace (com.sn_samp_master_ws) plugin. If the system does not list the plugin you want or if you are activating the plugin on an OEM or on-premise instance, select the **Plugin I'm looking for is not listed** check box and then enter the name of the plugin.
Select Maintenance Date and Time	The date and time to activate the plugin. **Note:** Plugins are activated in two batches, once in the morning and once in the evening, on every business day in the US Pacific time zone. If the plugin must be activated at a specific time, enter the request in the **Reason/ Comments** field.

Example

For example, see the following form to activate the CSM Workspace plugin on an instance named My Instance.

Activate Plugin form



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. Select **Submit**.
   For additional details about requesting a plugin, see Requesting a Plugin from the Service Catalog [KB0751715] article in the Now Support Knowledge Base.

Configuring ServiceNow Otto for Software Asset Management (SAM)

Configure the ServiceNow Otto for Software Asset Management (SAM) application to use the agentic workflow and generativeAI skills for managing your software assets autonomously.

Install ServiceNow Otto for Software Asset Management (SAM)

If you have the admin role, you can install the ServiceNow Otto for Software Asset Management (SAM) application. The ServiceNow Otto for Software Asset Management (SAM) application integrates generative AI capabilities into your daily workflow tasks.

Before you begin
Role required: admin

Procedure

1. Go to the ServiceNow Store.
2. In the search bar, enter ServiceNow Otto for Software Asset Management (SAM) and then select **Search**.
3. Select the ServiceNow Otto for Software Asset Management (SAM) widget and then select **Get** to make this application available for installation on your ServiceNow instance.
4. On your ServiceNow instance, navigate to **All** > **System Definitions** > **Plugins**.
5. Search for the ServiceNow Otto for Software Asset Management (SAM) application.
6. Select **Install**.

Result
The agentic workflow and the AI agents included in the ServiceNow Otto for Software Asset Management (SAM) application are installed on your ServiceNow instance.

What to do next

1. Enable the Now Assist panel to access the AI agents. For details, see Activate the ServiceNow Otto panel standard chat.
2. Activate the AI Search application on your ServiceNow instance enabling the AI agents to search and get related records.
   a. Navigate to **All** > **AI Search** > **AI Search Status**.
   b. Trigger the automatic AI Search activation process on your ServiceNow instance by selecting **Request AI Search**.

   Note: The activation process can take up to 24 hours.

Configuring ServiceNow Otto for Software Asset Management (SAM) skills

If you have the admin role, you can configure the ServiceNow Otto for Software Asset Management (SAM) application to use generative AI skills in the Software Asset Workspace.

Before you begin
Role required: admin

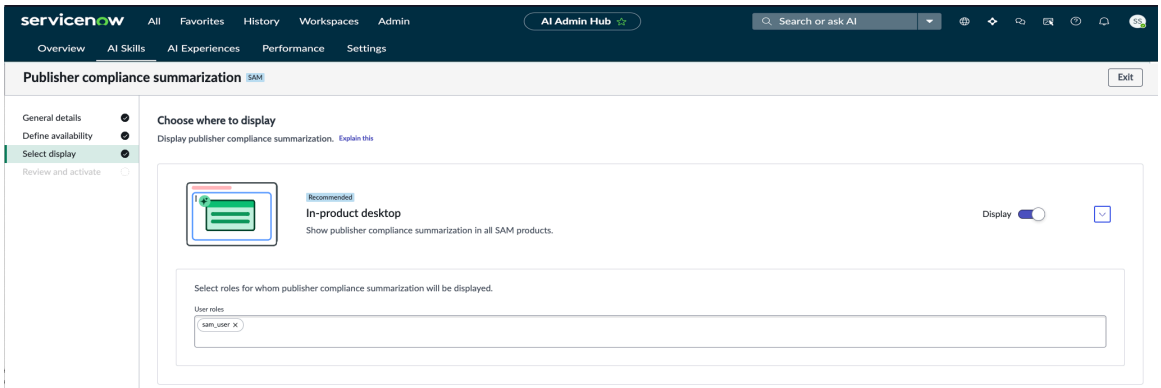
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Starting with the Zurich Patch 4 release, generative AI skills for Now Assist for SAM are automatically activated on your instance by default and require no configuration. However, if you deactivate a skill, you need to manually reactivate that skill by following the specified procedure.

Procedure

1. Install the ServiceNow Otto for Software Asset Management (SAM) plugin (sn_now_assist_sam).
2. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the AI Admin Hub console.
3. Select **SAM** under the **Technology** workflow group.
4. On the Now Assist skills for SAM page, select **Activate skill** for the skill that you would like to activate.
   The page for the skill that you activated opens with the General details section highlighted.
5. In the General details section, select **Save and continue**.
   The settings in the General details section are read-only.
6. In the Select display section, select **Display**.



   When selected, the skill is displayed on forms and workspaces.

   The sam_user role is the default role for viewing the skill. You can add additional roles if you want to.

   Custom role configurations for accessing generative AI skills are preserved. For example, if you added an alternative role such as the sam_admin role instead of the default sam_user role, the sam_admin role will retain access, while the sam_user role will lose access, as per the custom configuration.

7. Select **Save and continue**.
8. In the Review and activate section, review your choices and select **Activate**.
   The Successfully activated message box opens and the skill is activated. You're ready to use the skill in the Software Asset Workspace. For details on using the skills, see Using generative AI skills in ServiceNow Otto for Software Asset Management (SAM).

Skill inputs and triggers for ServiceNow Otto for Software Asset Management (SAM)

Get a quick overview of the skill inputs and triggers for ServiceNow Otto for Software Asset Management (SAM). By configuring the inputs or triggers for a skill, you can determine how and when a skill is used.

Depending on the selected skill, you can configure the inputs or triggers. These settings determine how and when a skill is used. An input identifies the data that is used for a skill, such

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

as the table and fields that are used to generate a publisher summary. A trigger initiates an action, such as when the system generates a publisher summary.

Publisher compliance summarization skill

For the publisher compliance summarization skill, select the triggers that determine when a publisher compliance summary is generated. You can also select the properties that control how a publisher compliance summary is displayed. To display the publisher compliance summary, you need to select the **Display** toggle button on the Choose where to display page while configuring Now Assist for SAM. For details on the **Display** toggle button, see Configuring ServiceNow Otto for Software Asset Management (SAM) skills.

The following table lists the triggers that determine when a publisher compliance summary is generated and how a publisher compliance summary is displayed.

Triggers for the publisher compliance summarization skill

Trigger	Description
User-triggered	Publisher compliance summary that is generated when the agent manually triggers the skill by selecting **Summarize** in the Publisher details page.

The following table lists the inputs for the publisher compliance summarization skill.

Inputs for the publisher compliance summarization skill

Input	Description
Reconciliation results	Compliance status of the software products with regards to the discovery and entitlements.
Software Lifecycle Report [sam_sw_product_lifecycle_report]	Product life-cycle details for all the software products that are installed in your environment.
Dashboards	Dashboards include Discovered inventory, Normalization and content, and Health check.

Product compliance summarization skill

For the product compliance summarization skill, select the triggers that determine when a product compliance summary is generated. You can also select the properties that control how a product compliance summary is displayed. To display the product compliance summary, you need to select the **Display** toggle button on the Choose where to display page while configuring Now Assist for SAM. For details on the **Display** toggle button, see Configuring ServiceNow Otto for Software Asset Management (SAM) skills.

The following table lists the triggers that determine when a product compliance summary is generated and how a product compliance summary is displayed.

Triggers for product compliance summarization skill

Trigger	Description
User-triggered	Product compliance summary is generated when the agent manually triggers the skill by

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Triggers for product compliance summarization skill (continued)

Trigger	Description
	selecting **Summarize** in the Publisher details page.

The following table lists the inputs for the product compliance summarization skill.

Inputs for the product compliance summarization skill

Input	Description
Reconciliation results	Compliance status of the software products with regards to the discovery and entitlements.
Software Lifecycle Report [sam_sw_product_lifecycle_report]	Contains product life-cycle details for all the software products that are installed in your environment.
Dashboards	Dashboards include Discovered inventory, Normalization and content, Health check, and Optimization and Savings dashboard.
SAP related tables	The SAP related tables include: • SAP Document Type [samp_sap_document_type] • SAP Digital Access Usage [samp_sap_digital_access_usage] • SAP Engine Usage [samp_sap_sw_client_access] • SAP System User [samp_sap_system_user]
Software Subscription [samp_sw_subscription] table	Contains information pertaining to user software subscriptions.
Purchased Subscription Details [samp_purchased_subscription_details]	Contains the information pulled from the Microsoft Azure portal related to subscriptions purchased and assigned for Microsoft 365.
Software Installation table [cmdb_sam_sw_install]	Contains information on all software installed in your environment.

Recommended actions skill

For the recommended actions skill, select the triggers that determine when a list of recommended actions is generated. You can also select the properties that control how recommended actions is displayed. To display recommended actions, you need to select the **Display** toggle button on the Choose where to display page while configuring Now Assist for SAM. For details on the **Display** toggle button, see Configuring ServiceNow Otto for Software Asset Management (SAM) skills.

The following table lists the triggers that determine when recommended actions are generated and how the list of recommended actions is displayed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Triggers for recommended actions skill

Trigger	Description
User-triggered	Recommended actions is generated when the user manually triggers the skill by selecting either of the two options in the Publisher details page: • Get recommendations icon on Recommended actions sidebar and then select **Get recommendations**. • **Summarize** button for a product. When you select **Summarize**, both the product summary along recommended actions gets generated.

The following table lists the inputs for the recommended actions skill.

Inputs for the recommended actions skill

Inputs	Source
Configuration inputs	
Health check issues	Scan Findings [Scan_finding]
Installs requiring actions	Installs Unlicensed Reasons [samp_install_unlicensed_reason]
Normalization Rate	Software Discovery Models [cmdb_sam_sw_discovery_model]
Normalization suggestions	Normalization Suggestions [samp_normalization_suggestion]
Maintenance inputs	
Remediation options	Remediation Options [samp_remediation_option]
End of Life	Software Lifecycle Report [sam_sw_product_lifecycle_report]
Missing end of life dates	Software Lifecycle Report [sam_sw_product_lifecycle_report]
Expiring entitlements	Software Entitlements [alm_license]
Optimization inputs	
Removal candidates	Removal Candidates [samp_sw_reclamation_candidate]
Optimization (Microsoft):	Software Subscriptions [samp_sw_subscription]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inputs for the recommended actions skill (continued)

Inputs	Source
• Inactive subscriptions • Unassigned subscriptions • Licensing optimizations	Purchased Subscription Details [samp_purchased_subscription_details] Microsoft Core License Optimization Reports [samp_ms_optimization_report]
Optimization (Adobe): • Inactive users • Unresolved subscriptions	Software Subscriptions [samp_sw_subscription]
Optimization (Red Hat): Licensing optimizations	Potential savings by optimizing licenses [samp_license_optimization_summary]
Optimization (SAP): • Inactive users • Named user assignment • Locked out user • Licensed non-dialog users • Role based license optimization • Transaction based license optimization • Unused engines	SAP System Users [samp_sap_system_user] License Metric Results [samp_license_metric_result] Removal Candidates [samp_sw_reclamation_candidate]

SaaS user resolution skill

The following table lists the trigger for the SaaS user resolution skill.

Triggers for recommended actions skill

Trigger	Description
Auto-triggered	User resolution rules are automatically generated upon the activation of the SaaS user resolution skill.

The following table lists the inputs for the SaaS user resolution skill.

Inputs for the SaaS user resolution skill

Input	Description
List of fields with the **String** and **Email** type.	User [sys_user]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Contract entitlement data extraction skill

Triggers for contract entitlement data extraction skill

Trigger	Description
User-triggered	An entitlement is automatically generated from a contract when the user manually triggers the skill by selecting **Import contract document** in the software contract page.

The following table lists the inputs for the Contract entitlement data extraction skill.

Input for the Contract entitlement data extraction skill

Input	Description
The contract document	The contract document that the user uploads that is used for extracting the entitlement information.

Error log summarization skill

The Error log summarization skill transforms raw and cluttered application logs into clean, structured error summaries through systematic analysis. The skill identifies error patterns and classifies failure types such as API, code, infrastructure, database, and configuration. It traces root causes through stack traces and extracts key technical details while filtering out irrelevant log information. This skill also processes complex log traces that contain multiple errors, timeouts, exceptions, and system failures to provide concise, actionable error summaries that enable faster debugging and issue resolution. It handles various log formats and error patterns across different technology stacks, making it essential while dealing with production incidents.

The following table lists the trigger for the Error log summarization skill.

Triggers for the Error log summarization skill

Trigger	Description
User-triggered	Error log summary is generated when the user manually triggers the skill by selecting **Troubleshoot** on the SaaS integration profile page.

The following table lists the inputs for the Error log summarization skill.

Inputs for the Error log summarization skill

Input	Description
Outbound HTTP Logs [sys_outbound_http_log]	4xx and 5xx outbound request and response details, scoped by hostname, job sys_id, and time window.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inputs for the Error log summarization skill (continued)

Input	Description
Flow Execution Context [sys_flow_context]	Most recent errored flow or subflow execution context for the failing job or validate-connection action.
Action Type Definition [sys_hub_action_type_definition]	Resolves the internal name and scope of the action into the flow source sys_id that is used for context lookup.
Integration Profile [samp_sw_subscription_profile]	Profile metadata and custom properties such as action name, scope, validate timestamps, and troubleshooting parameters that scope the log queries.
Step-Level Execution Reports	Per-step inputs, outputs, and error details that are fetched through FlowExecutionSummaryUtil for the errored context.

Error resolution recommendation skill

The Error resolution recommendation skill synthesizes the error summary that is produced by the Error log summarization skill with available knowledge resources to generate prioritized, step-by-step resolution guidance. The skill correlates identified errors with knowledge base articles, historical solutions, support cases, and web search results to recommend the most effective troubleshooting approach. The skill consolidates information from multiple sources, removes redundant steps, and sequences actions from quick fixes to comprehensive solutions based on failure type, system impact, and resolution probability.

The following table lists the trigger for the Error resolution recommendation skill.

Triggers for the Error resolution recommendation skill

Trigger	Description
Auto-triggered	Resolution recommendations are automatically generated after the Error log summarization skill produces an error summary.

The following table lists the inputs for the Error resolution recommendation skill.

Inputs for the Error resolution recommendation skill

Input	Description
Error summary	Consolidated error signature such as status codes, messages, failing action, and profile context that is produced by the Error log summarization skill.
Web search results	External guidance, vendor documentation, and API deprecation or known-issue references that are matched to the error signature.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Spend transaction software classification skill

The Spend transaction software classification skill first identifies whether each imported spend transaction is a software purchase. If the transaction is classified as software, then the skill extracts the raw publisher and raw product details using the vendor name, transaction description, and GL account columns. Transactions that the skill classifies as non-software skip the extraction step for raw publisher and raw product and are not passed to the Spend transaction software normalization skill.

The following table lists the trigger for the Spend transaction software classification skill.

Triggers for the Spend transaction software classification skill

Trigger	Description
Auto-triggered	The skill classifies spend transactions as part of the spend transaction import pipeline through the *SAM - Label Spend Transactions* scheduled job. The job processes batches of transactions that haven't yet been classified.

The following table lists the input for the Spend transaction software classification skill.

Inputs for the Spend transaction software classification skill

Input	Description
Software Spend Transactions [sam_spend_transaction]	Reads the vendor name, transaction description, and GL account fields from imported spend transaction records.

The following table lists the plugin and store app dependencies for the Spend transaction software classification skill in the Brazil release.

Plugin and store app dependencies for the Spend transaction software classification skill

Release	Plugin	Store App with Version
Brazil	• Software Asset Management Professional [com.snc.samp] • Software Asset Management - Spend Detection [com.sn_sam_spend]	• ServiceNow Otto for Software Asset Management (SAM) [sn_now_assist_sam] - 11.0.0 • Software Asset Workspace [sn_sam_workspace] - 12.0.4

Spend transaction software normalization skill

The Spend transaction software normalization skill matches software spend transactions to existing publisher and product records to enable accurate spend reporting and license position tracking. The skill uses AI search to normalize the raw publisher and raw product derived by the Spend transaction software classification skill. When the skill finds a reliable match in existing publisher and product records, it populates the publisher and product fields on the spend transaction record. If no reliable match exists, the transaction remains unnormalized.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The following table lists the trigger for the Spend transaction software normalization skill.

Triggers for the Spend transaction software normalization skill

Trigger	Description
Auto-triggered	Normalizes the raw publisher and raw product after the Spend transaction software classification skill identifies a transaction as software. When a match is found in existing publisher and product records, the skill populates the Publisher and Product fields on the spend transaction record.

The following table lists the input for the Spend transaction software normalization skill.

Inputs for the Spend transaction software normalization skill

Input	Description
Extracted publisher and product values	Raw publisher and product produced by the Spend transaction software classification skill for transactions identified as software.

The following table lists the plugin and store app dependencies for the Spend transaction software normalization skill in the Brazil release.

Plugin and store app dependencies for the Spend transaction software normalization skill

Release	Plugin	Store App with Version
Brazil	• Software Asset Management Professional[com.snc.samp] • Software Asset Management - Spend Detection [com.sn_sam_spend]	• ServiceNow Otto for Software Asset Management (SAM) [sn_now_assist_sam] - 11.0.0 • Software Asset Workspace [sn_sam_workspace] - 12.0.4

Overwrite customizations for Software Asset Management migration

When migrating from the Software Asset Management plugin (ITSM Software Asset Management feature of Asset Management) to the Software Asset Management application, further actions are required by the customer after plugin activation to ensure successful migration of customized forms and lists.

Before you begin

Role required: admin

About this task

If these lists and forms have been customized before the migration, they may have been skipped during plugin activation and, in that case, require further action.

- Software Entitlements (formerly Software Licenses)
- Software Allocations (formerly Software Entitlements)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Software Models
- Discovery Models
- Software Installations

You can review plugin activation changes in the Upgrade History module to determine what changes have automatically been skipped so you can Resolve a skipped update and set a resolution status, if needed.

Certain fields added by the migration also must be configured to take advantage of the new features offered.

Procedure

1. Navigate to **All** > **System Diagnostics** > **Upgrade History**.
2. Identify the records that correspond to the upgrade history for the activation of the Software Asset Management Professional (com.snc.samp) plugin.
   The records in System Upgrades list that represent plugin activation contain the value **n/a** in the **From** field, and plugin name in the **To** field (such as com.snc.samp, com.snc.samp.core, com.snc.sam.core, com.glide.data_services_canonicalization.client, com.snc.asset_management, com.snc.model, com.snc.procurement). You can determine the list of related plugins based on the time stamp of when the Software Asset Management plugin was activated by sorting on the **Upgrade started** column.
3. Open a Software Asset Management upgrade record that has changes skipped.
4. In the **Upgrade Details** related list, open an Upgraded Details record, and then click **Resolve Conflicts** to view a side-by-side comparison of the base system file with the customized file.
5. Click **Revert to Base System** to overwrite the skipped change if it applies to form or list customization, and note down the changes.
   Repeat these steps for all upgrade entries with skipped changes relating to customizations.
6. In the Software Asset Management application, manually reconfigure your original form and list customizations.
7. In the Software Asset Management application, set new field values (added as part of the automatic changes performed by plugin activation) to take advantage of the new features offered.

   a. Navigate to **Software Asset** > **Licensing** > **Software Models**.
      - Select the software product in the **Product** reference field.
      - Select a discovery map, or clear the **Discovery Map** field and set the discovery conditions to find all discovery models that correspond to the software model.

   b. Navigate to **Software Asset** > **Licensing** > **Software Entitlements** (formerly Software Licenses).
      - Navigate to **Software Asset** > **Licensing** > **Software Entitlements** (formerly Software Licenses).
      - Select the **License Metric** that the software license is counted against when reconciliation is run.
      - Define the upgrade and downgrade scenarios covered by certain rights.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. In the **User Allocations** and **Device Allocations** related lists (formerly User/Device Entitlements), verify that the number of allocated rights are not more than rights owned. If so, delete allocations so that the number of allocations does not exceed the number of rights owned.

8. If you have entitlements that require management of license keys, you can create multiple license keys associated to the same entitlement, as well as allocate these license keys to a user or device.

Related topics

plugin

Configure SCCM for Software Asset Management

Set up Microsoft SCCM for Software Asset Management to populate the Software Installation [cmdb_sam_sw_install] table with client software found in your environment. You can also set up SCCM for Client Software Distribution to reclaim unused and underused software.

Before you begin

Role required: sn_client_sf_dist.csd_admin or admin

Tip: Sign up for the Software Asset Management: Integration with SCCM for Reclamation and Distribution course to learn about SCCM setup, reclamation, and more.

Procedure

1. Activate the SCCM integration plugin for your version of SCCM.
   - Integration — Microsoft SCCM 2012 v2 (com.snc.integration.sccm2012v2)
   - Integration — Microsoft SCCM 2016 (com.snc.integration.sccm2016)

   If you want to pull software usage data from SCCM, activate the software usage plugin for your version of SCCM.

   - Integration — Microsoft SCCM 2012 v2 Software Usage (com.snc.samp_usage_sccm) plugin
   - Integration — Microsoft SCCM 2016 Software Usage (com.snc.samp.usage_sccm_2016) plugin

   Important: These Microsoft SCCM plugins will be deprecated in the Tokyo release. If you are integrating with SCCM for the first time, request and install the Service Graph connector for Microsoft SCCM application from theServiceNow Store instead. If you have already activated one of the Microsoft SCCM plugins on your ServiceNow instance, use the Migration Readiness Tool for Service Graph Connector for SCCM store application to prepare your instance for migration from the Microsoft SCCM plugin to the Service Graph connector. See Service Graph connector for Microsoft SCCM for more information on the Service Graph connector.

2. **Optional:** If you want to reclaim unused and underused software, set up SCCM for Client Software Distribution (CSD).

   a. Request the Client Software Distribution (com.snc.orchestration.client_sf_distribution) plugin.
   Client Software Distribution requires a subscription to Orchestration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. In SCCM, create an application, install collection, and uninstall collection for any software that you have not already created these items for.

   (Optional) After you create these items, you can then deploy the application for both the install and uninstall collection. For detailed instructions, see Create and deploy an application with SCCM and Create collections in SCCM from the Microsoft SCCM product documentation.

   To reclaim software, an application, install collection, and uninstall collection must exist for the software. If you installed software manually or using an SCCM legacy package, you must still create these items so that you can reclaim the software.

   Note: If you installed software using an SCCM legacy package, you can use Microsoft Package Conversion Manager to create the application.

3. Setup the MID Server.
4. Configure SCCM and the ServiceNow AI Platform.
5. To offer an application from the Service Catalog, create a catalog item.

What to do next
Once you've configured SCCM and discovered your software applications, you can create reclamation rules to identify unused or underused software, view software usage, and reclaim software.

Using AI in Software Asset Management

Streamline your software asset operations by using the ServiceNow Otto for Software Asset Management (SAM) agentic AI workflows and generative AI skills.

Using agentic workflows in ServiceNow Otto for SAM

Use the ServiceNow Otto for SAM AI agent collection to complete tasks autonomously.

ServiceNow Otto for Software Asset Management (SAM) AI agent collection to help manage software asset request agentic workflow

Use the Help manage software request agentic workflow to fulfill a software request by either allocating the available entitlements or generating a purchase order for the software model.

Help manage software request overview

Use the Help manage software request agentic workflow to automate software asset sourcing through auto allocation or purchase order creation. The Help manage software request AI agents enable faster request resolution, improved operational efficiency, and boost user satisfaction.

To use the Help manage software request agentic workflow, the Procurement (com.snc.procurement) plugin needs to be installed along with the ServiceNow Otto for SAM (sn_now_assist_sam) plugin. To use the Microsoft license assignment AI agent for Microsoft 365 allocations, the Software Asset Management - SaaS License Management store application must be installed and an active Microsoft 365 integration must be configured in your instance.

The following three scenarios are supported for software requests:

- User based allocations: a user requests a software model with user-based entitlements.
- Device based allocations: a user requests a software model with device-based entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

When a user who has requested the software has multiple devices assigned to them, the agent asks the fulfiller to select one of the user's devices for the allocation process. If the device isn't assigned to the requested item number user during the software fulfillment, then a message appears in the ServiceNow Otto panel stating that the user has no devices associated. The user must associate a device and try again. If the device is assigned after this, then the fulfiller user should initiate a new panel chat and provide an utterance in the panel to fulfill the requested item number, rather than using the existing panel chat.

- Purchase order flow: if no entitlements are available, a purchase order is created.

The Help manage software request agentic workflow needs the following conditions to execute. Once these conditions are met, the agentic workflow is automatically triggered.

- The requested item is approved.
- The requested item belongs to a software category.
- The requested item isn't sourced.
- The **Assigned to** field in the Requested item [sc-req item] table isn't empty.

The Help manage software request agentic workflow supports both Azure OpenAI Service and Now LLM Service.

Help manage software request agentic workflow

By automating the sourcing of software assets through auto-allocation or purchase order creation, the agentic workflow speeds up request resolution and boost operational efficiency.

To automatically trigger the Help manage software request workflow for sourcing software requests, follow these steps:

1. Initiate and approve a software asset request:
   a. A user with any role creates a software asset request in the Service Catalog application.
   b. If the requested items in the cart amount to a thousand dollars, the request is automatically approved. For amounts more than a thousand dollars, the request must be approved. Auto-approval rules can differ from organization to organization; the default amount for auto-approval is a thousand dollars.
2. Assign the software asset request for sourcing:
   a. Once the request is approved, the procurement_user role, navigates to the Procurement module that resides in the Asset Workspace. If the Hardware Asset Management application is installed, the name of the workspace changes to Hardware Asset Workspace.
   b. The procurement_user role selects the Items tab in the Procurement module and selects a value in the **Assigned to** field for the requested item.

      Note: The itil, the procurement_user, and the now_assist_panel_user roles have access to the panel. The fulfiller needs the itil and procurement_user roles if you have the ServiceNow Otto for IT Service Management (ITSM) store application installed. If you have the ServiceNow Otto for Software Asset Management (SAM) store application but not the ServiceNow Otto for IT Service Management (ITSM) store application, then the fulfiller requires the itil, procurement_user, and now_assist_panel_user roles to fulfill the request via the panel trigger.

   The procurement_user role gets notified in the panel that the software request is getting fulfilled.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Once the software asset request is assigned, the Help manage software request agentic workflow gets triggered to source the request.

- If entitlements are available for the software request, allocations are automatically made.
- If entitlements aren't available, a purchase order is generated. The AI agents take inputs and confirmation from you when needed.

3. Assign Microsoft 365 licenses based on availability:

   If the requested item is identified as a Microsoft 365 subscription software, the Microsoft license assignment AI agent gets triggered. The AI agent checks for license availability, assigns available licenses to users, and creates a reservation order if there are no available licenses.

   The AI agent verifies if there are available licenses for the requested item on the Microsoft 365 Admin Center.

   a. If the licenses are available, the AI agent then checks whether group licenses are available for the requested item.
      - If licenses assigned to Microsoft Entra ID groups are available, then the AI agent checks for single or multiple groups.
        - If there are multiple groups, the AI agent prompts the user to select a Microsoft Entra ID group. The user gets assigned to the selected group and the license gets assigned to the user.
        - If there's a single group, the AI agent assigns the user to that group, and the license gets assigned to the user.
      - If licenses assigned to Microsoft Entra ID groups aren't available, the AI agent proceeds to check for individual license availability. If individual licenses are available, the AI agent assigns the user to the license in the Microsoft 365 Admin Center. The license assignment is verified at the next user subscription data pull through the Microsoft 365 integration.

   b. If the licenses aren't available, the AI agent checks for available entitlements.
      - If the entitlement is available, the AI agent creates a reservation order using the existing entitlement. It generates a catalog task to replicate that reservation within the Microsoft 365 Admin Center.
      - If the entitlement isn't available, the AI agent generates a catalog task to create entitlement in ServiceNow.

To view the licenses allocated by the agentic workflow, navigate to the AI Activity log in the Activity center of the Software Asset Workspace. Select the **Licenses allocated** link in the AI Activity log to open the Procurement request items page in the Asset Workspace or the Hardware Asset Workspace.

AI agents used in the Help manage software asset requests agentic workflow

The Help manage software request agentic workflow uses the following AI agents to execute instructions.

AI agents and their role in the Help manage software request agentic workflow

AI agent	AI agent role
Software entitlement allocation AI agent	Validates software license requests and allocates licenses from existing inventory

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AI agents and their role in the Help manage software request agentic workflow (continued)

AI agent	AI agent role
	when available, using the request item number (RITM).
Purchase order creation AI agent	Sources a request item by creating a purchase order. Asks for inputs sequentially and takes user input in case there are multiple options such as with stockrooms, vendors, metric group, or license metrics.
Microsoft license assignment AI agent	Assigns a Microsoft 365 license from the existing inventory when available, using the RITM. The AI agent checks for both group and individual licenses. If the licenses aren't available, the AI agent creates a reservation order.

ServiceNow Otto for Software Asset Management (SAM) AI agent collection to evaluate software removal candidate agentic workflow

Use the Evaluate software removal candidate agentic workflow to assess installed or subscription-based software for potential removal by analyzing their usage over a specified period and determining the total number eligible for removal. After user confirmation, the workflow initiates the eligible removal candidate for reclamation.

Evaluate software removal candidate overview

Use the Evaluate software removal candidate agentic workflow to identify and evaluate genuine software removal candidates and recommend software installations for reclamation, based on a series of intelligent checks that help ensure sufficient context for safe removal actions.

Ensure that you have the following prerequisites for running the Evaluate software removal candidate agentic workflow:

- Your organization has a software asset management system integrated with AI agents.
- Access to the ServiceNow Otto panel.
- AI agents have access to reclamation rules, removal candidates, products, and license metric results.

Evaluate software removal candidate agentic workflow

By automatically examining and verifying software removal candidates, the Evaluate software removal candidate agentic workflow helps in reducing manual effort, minimizing compliance risk, and unlocking measurable license cost savings.

Any removal candidates that is in the **Ready** state can be reclaimed

To initiate the agentic workflow, perform the following steps:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. In the Software Asset Workspace, navigate to one of these pages:
   - **License usage** > **Removal candidates**
   - **License usage** > **Publishers** > **Removal candidates tab**
2. Select **Evaluate removal candidates**.
3. Select the Otto icon  icon on the top right side of the workspace.

   The panel prompts you to select a product for evaluating software removal candidates.

   The prompt changes based on the page from where you initiated the agentic workflow:
   - If you start from the Removal candidates page, you are prompted to choose a product from all the available publishers.
   - If you start from the Publisher details page, the products are narrowed down to the specific publisher.
   - If you start from the software model results tab within the Publisher details page, you are prompted to select removal candidates only for that particular product.
4. Select a product and then select **Submit**.

   The AI agent initiates a series of checks using multiple criteria, assessing factors such as the product ID, whether it's installed or subscription-based software, and its last usage, among other metrics. If any check fails, the panel displays an error message indicating that the workflow cannot continue. If all the checks are successful, a message appears indicating the number of removal candidates identified for the particular product. You are then asked if you would like to reclaim the software. If you confirm, the reclamation process begins. After the process is complete, you are informed about all the removal candidates that were successfully reclaimed for the specific product.

   Once a removal candidate has been reclaimed by the agentic workflow, the Activity tab in the removal candidate record is updated with relevant work notes.

AI agents used in the Evaluate software removal candidate agentic workflow

AI agent and its role in the Evaluate software removal candidate agentic workflow

AI agent	AI agent role
Software removal candidate evaluation AI agent.	Identifies or proposes users for removal from a software product by assessing their usage within a set time frame and ensuring that the total number of eligible candidates for reclamation is notified to the user, while excluding any VIP users.

ServiceNow Otto for Software Asset Management (SAM) AI agent collection to create software reclamation rule

Use the Create software reclamation rule agentic workflow to automatically create reclamation rules by identifying software products that lack reclamation rules but are viable candidates.

Create software reclamation rule overview

Use the Create software reclamation rule agentic workflow to streamline and automate the creation of reclamation rules. Create reclamation rule without having to manually review a

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

product's utilization and spend thereby improving license utilization, faster turnaround, improved operational efficiency, and enhanced user satisfaction.

Role masking

Roles required: sam_admin.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Create software reclamation rule agentic workflow

Automating the creation of reclamation rules helps SAM managers to scale their reclamation efforts by automatically identifying and suggesting reclamation rules for overlooked software.

To start the agentic workflow, you must have the sam_admin role.

The Create reclamation rule agentic workflow can be initiated from the following pages:

- Software asset overview page
- Publisher details page
- License operations page

Depending on the page, the sam_admin role is on, follow the steps mentioned in the following table:

Initiating the Create reclamation rule agentic workflow

Software asset overview page	Publisher details page	License operations page
1. Navigate to the Activity center. 2. Select **suggestions** in the **Reclamation rules** box in the Activity center. 3. Select the Otto icon on the top-right side of the workspace to open the ServiceNow Otto panel. If the panel is already open, select the hamburger icon. 4. Select **Create reclamation rule** in the Active section the panel. 5. Select a product from a list of products that need	1. Select a product for the specific publisher. 2. Select the Removal candidates tab. 3. Select **Create reclamation rule**. 4. Select the Otto icon on the top-right side of the workspace to open the panel. If the panel is already open, select the hamburger icon. The agentic workflow is initiated.	1. Navigate to **Administration** > **Reclamation Rules**. 2. Select **Create reclamation rule** 3. Select the Otto icon on the top-right side of the workspace to open the panel. If the Otto panel is already open, select the hamburger icon. 4. Select a product from a list of products that need reclamation rules and then select **Submit**. The agentic workflow is initiated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Initiating the Create reclamation rule agentic workflow (continued)

Software asset overview page	Publisher details page	License operations page
reclamation rules and then select **Submit**. The agentic workflow is initiated.		

The AI agent initiates a series of checks assessing factors such as the usage of the product with regard to spend and utilization, among other metrics. After the checks are completed, the AI agent provides you with details such as the name of the reclamation rule name, the assignment group with which the reclamation rules will get created. You're then asked if you would like to create the reclamation rule with the given details or if you want to modify any parameters such as assignment group in the reclamation rule. Mention any modifications that you want; or else confirm that you want to go ahead with the creation of the reclamation rule. After you confirm, the reclamation rule gets created along with the name of the product and a link to the reclamation rule. The Activity tab in the reclamation rule record gets updated with the relevant work notes.

AI agents used in the Create software reclamation rule agentic workflow

AI agent and its role in the Create software reclamation rule agentic workflow

AI agent	AI agent role
Software reclamation rule creation AI agent.	Retrieves reclamation rule suggestions, analyzes the license utilization, and generates a reclamation rule for a software product based on a user's response only if the reclamation rule doesn't exist.

Important: This AI agent is turned on by default. For more information, see AI agents, skills, and agentic workflows on by default.

Using generative AI skills in ServiceNow Otto for Software Asset Management (SAM)

Use ServiceNow Otto for Software Asset Management (SAM) generative AI capabilities to streamline your daily Software Asset Management workflow.

Generate publisher compliance summaries by using ServiceNow Otto for Software Asset Management (SAM)

Generate a comprehensive summary for a publisher that covers software deployment, license compliance, configuration health, and optimization. The detailed publisher summary helps you to gain insights into the publisher estate.

Before you begin

Role required: sam_user

About this task

Note: The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the Australia Patch 4 release, Google Gemini is the default model provider for the Publisher compliance summarization generative AI skill.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ServiceNow Otto for SAM generates the publisher summaries by using reconciliation results, product lifecycle reports, and dashboards such as Discovered inventory, Normalization and content, and Health check.

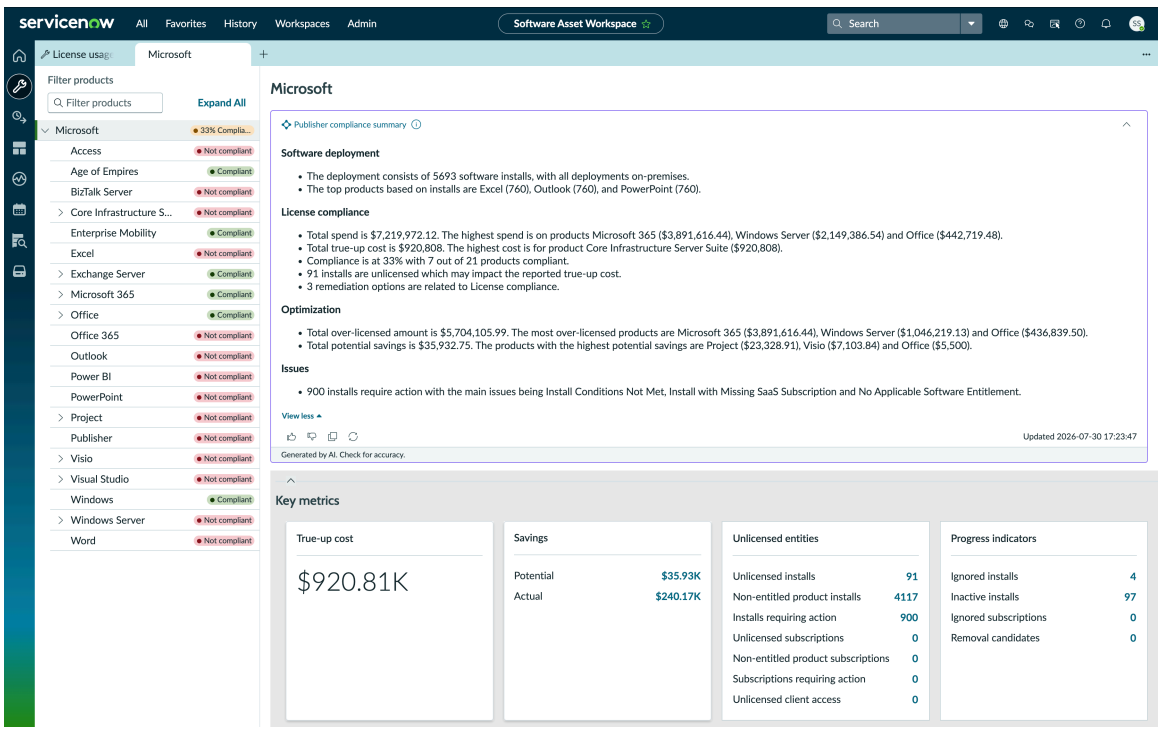
Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. Select the License usage view.
3. Select a publisher to view its summary.
4. On the Publisher details page, select **Summarize**.

> **Note:** If the system property `com.snc.samp.manage.published.products` is set to true in your ServiceNow instance, reconciliation generates publisher results for published products, unpublished products, and for all products of a publisher. The **Summarize** button is unavailable for generating publisher compliance summary for published and unpublished products. Publisher compliance summary is not supported when filtering by **Published** or **Unpublished** status in the **Published status** filter.

The ServiceNow Otto for SAM application starts generating the summary for the selected publisher. After the summary is compiled, the results of the summary appear under different sections.

After it's generated, the publisher summary is not automatically saved. If you close the **Publisher details** tab where you generated the summary, or if you reload the page, the publisher summary is not available. To regenerate the summary, select **Summarize**.



5. **Optional:** You can perform the following actions on the generated summary.

Action	Description
Copy to clipboard icon	Copies the summary to a clipboard.
Refresh icon	Regenerates the publisher summary.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action	Description
Feedback	If you found that the summary was helpful, select the helpful icon. If you found that the summary wasn't helpful, select the not helpful icon. This feedback improves the generative AI model and can help to improve future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).

Generate product compliance summaries by using ServiceNow Otto for Software Asset Management (SAM)

Generate a comprehensive summary for a product that covers software deployment, license compliance, optimization, and issues. The detailed product compliance summary helps in gaining insights into your software assets and makes it easier to manage licenses.

Before you begin

Role required: sam_user

About this task

Note: The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the Australia Patch 4 release, AWS Claude is the default model provider for the Product compliance summarization generative AI skill.

ServiceNow Otto for SAM generates the product summaries by using reconciliation results, product life-cycle reports, and dashboards such as Discovered inventory, Normalization and content, and Health check.

Note: Health check details are shown only for Windows Server, SQL Server, and Oracle Database.

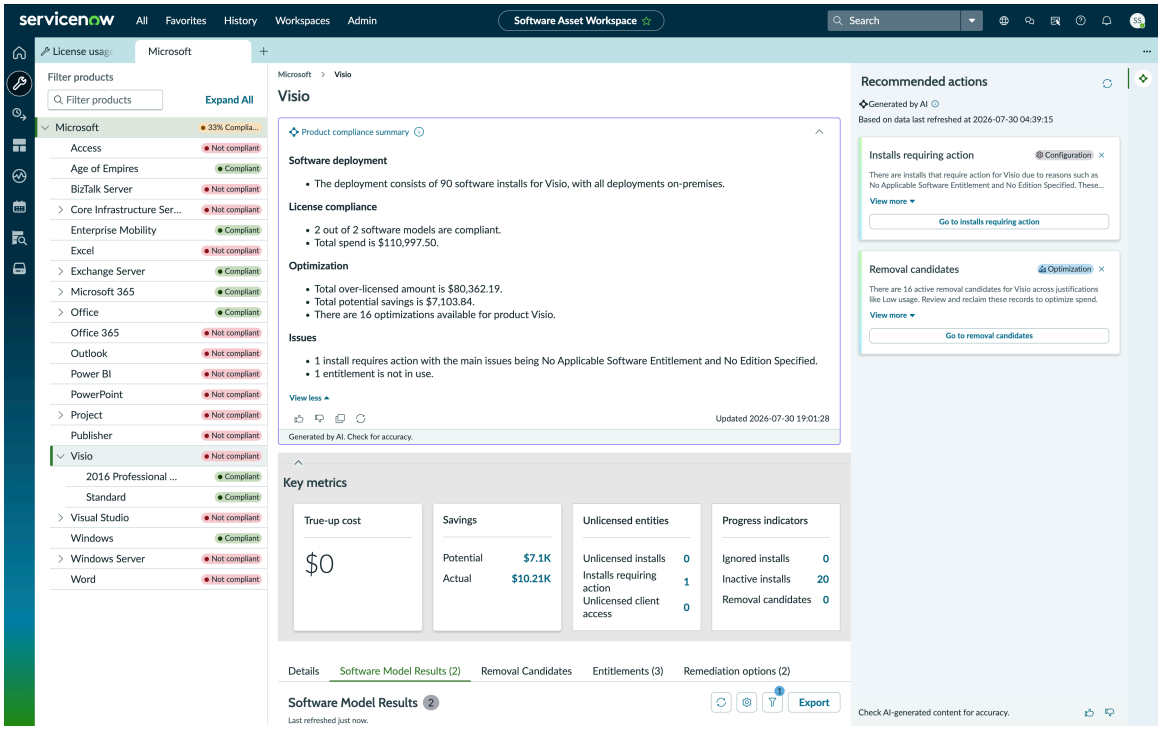
When you run reconciliation with grouping, product summarization and recommended actions are available only for the parent product results, not for the individual child product results.

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. Select the License usage view.
3. Select a publisher.
4. On the Publisher details page, select a product.
5. Select **Summarize**.

   The ServiceNow Otto for SAM application starts generating the summary for the selected product. After the summary is compiled, the results of the summary appear under different sections. Additionally, recommended actions are also automatically generated when you select **Summarize**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



After it's generated, the product summary isn't automatically saved. If you close the Publisher details page where you generated the summary, or if you reload the page, the product summary isn't available. To regenerate the summary, select **Summarize**.

6. **Optional:** You can perform the following actions on the generated summary.

Action	Description
Copy to clipboard icon	Copies the summary to a clipboard.
Refresh icon	Regenerates the product summary and rec ommended actions.
Feedback	If you found that the summary was helpful, select the helpful icon. If you found that the summary wasn't helpful, select the not helpful icon. (Optional) This feedback improves the gener ative AI model and can help to improve future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).

Generate recommended actions for products by using ServiceNow Otto for Software Asset Management (SAM)

Generate a list of recommended actions to manage software license compliance and optimize licensing spend. The recommended actions help you to take appropriate steps to fix any configuration, maintenance, and optimization issues.

Before you begin

Role required: sam_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Note: The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the Australia Patch 4 release, AWS Claude is the default model provider for the Recommended actions generative AI skill.

ServiceNow Otto for SAM generates the recommended actions for products by using reconciliation results, product life-cycle reports, and dashboards such as Discovered inventory, Normalization and content, and Health check.

Note: Health check details are shown only for Windows Server, SQL Server, and Oracle Database.

When you run reconciliation with grouping, product summarization and recommended actions are available only for the parent product results, not for the individual child product results.

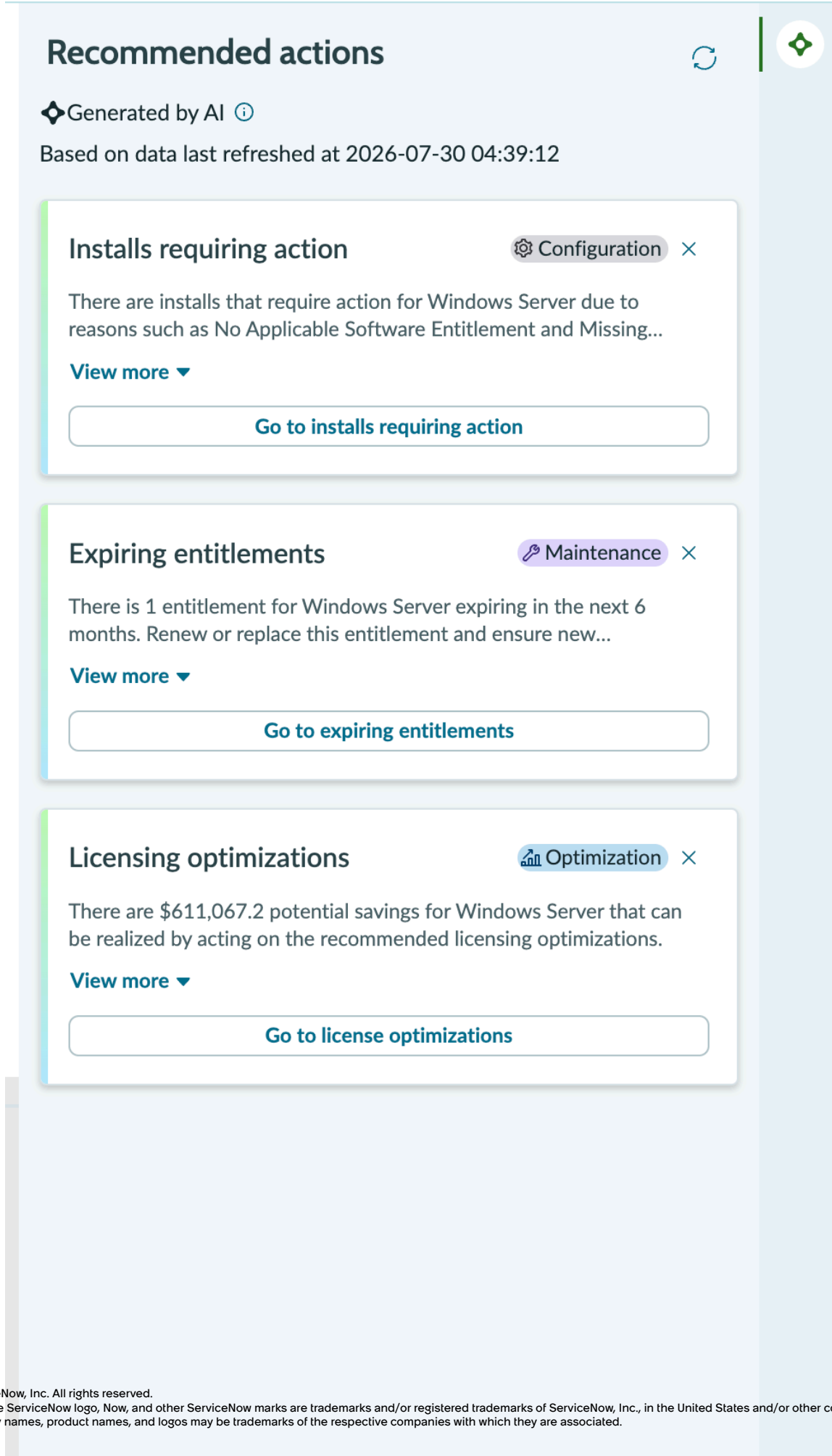
Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. Select the License usage view.
3. Select a publisher.
4. On the Publisher details page, select a product for the publisher.
5. Select **Summarize** or the Recommended actions icon on the right hand side of the page and then select **Get recommendations**.

   ServiceNow Otto for SAM application starts generating recommended actions for the selected product. After the recommended actions are generated, the results appear as cards under the following three categories:

   - Configuration
   - Maintenance
   - Optimization

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The compiled results can differ from product to product based on the current compliance level of a product.

Recommended actions are generated even if a product is fully compliant. Recommended actions are generated if there are any actions related to health issues, maintenance or optimization.

6. Select a button on a card to view the list view page for that action.
   After the recommended actions are generated, the results aren't automatically saved. If you close the Publisher details page where you generated the recommended actions, or if you reload the page, the results aren't available.
7. **Optional:** You can perform the following actions on the generated recommended actions.

Action	Description
Regenerate icon	(Optional) Regenerates the list of recommended actions. You can find this icon in the top right corner of the Recommended actions box.
Feedback	(Optional) If you found that the recommended actions was helpful, select the helpful icon. If you found that the recommended actions wasn't helpful, select the not helpful icon. You can find these icons at the bottom of the Recommended Actions box. This feedback improves the generative AI model and can help to improve future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).

8. Select the Dismiss icon to dismiss an action; whether you have resolved the action or decided not to work on the action.
   Once you have dismissed all the actions, a message appears mentioning that all recommendations have been dismissed.

Generate troubleshooting guidance for SaaS and SSO integrations by using ServiceNow Otto for Software Asset Management (SAM)

Generate error messages and detailed guidance to troubleshoot runtime job failures for SaaS and SSO integrations. These recommendations enable you to resolve common configuration issues and reduce downtime.

Before you begin

Role required: sam_integrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Note: The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the Australia Patch 4 release, AWS Claude is the default model provider for the Error resolution recommendation and Error log summarization generative AI skill.

ServiceNow Otto for SAM generates the troubleshooting guidance for all SaaS and SSO integrations by enabling dynamic debug-level logging for flow actions and validating connections. The troubleshooting guidance is available for both current and new SaaS integrations.

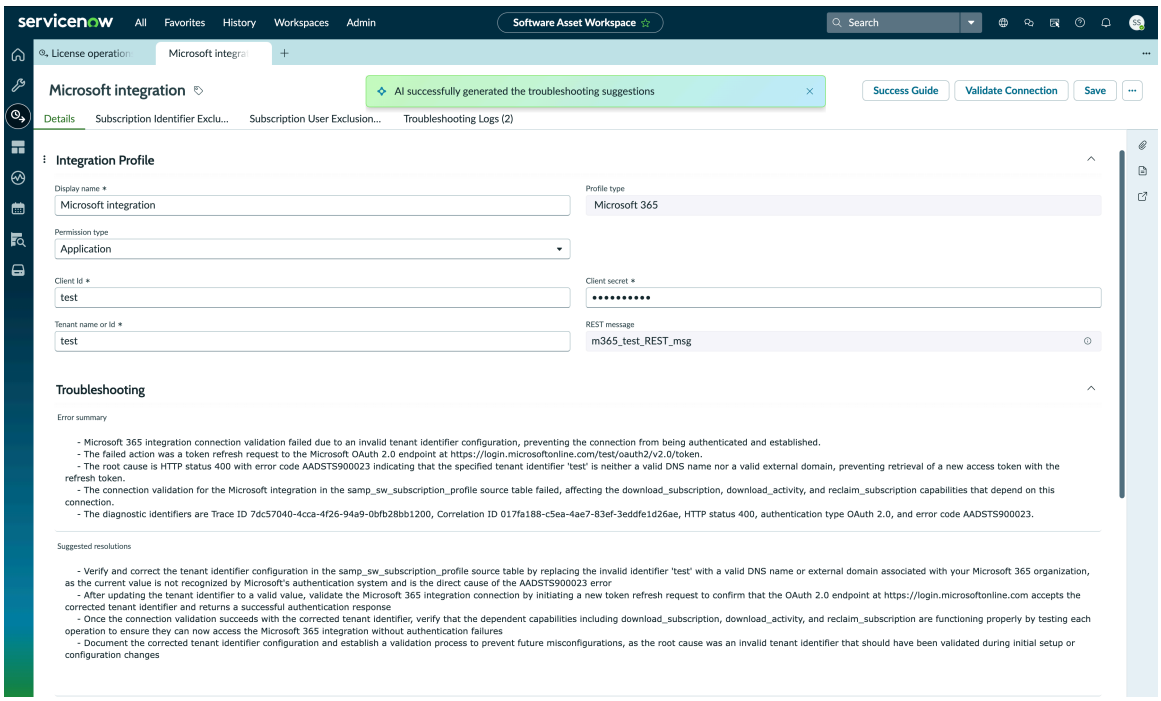
Procedure

1. Navigate to **Workspace** > **Software Asset Workspace** > **License operations**.
2. Select **User subscription** and then select **Direct integration profiles**.
3. Generate troubleshooting guidance.

Integration	Action
Existing	**a.** Select the integration profile from the Direct integration profiles list. An error message is displayed on the In tegration Profile form indicating that the scheduled job failed to complete success fully. **b.** Select **Troubleshoot** on the error message. The ServiceNow Otto for SAM application generates the troubleshooting details that contain the error summary and suggested resolutions. Each error that's listed in the Er ror Summary section has a corresponding troubleshooting guidance in the Suggested Resolutions section.
New	**a.** Select **New**. **b.** Select an integration type from the drop-down list. **c.** Select **Continue**. **d.** On the Integration profile form, enter a unique and descriptive **Display name**. **e.** Verify the required user roles or API permis sions specified under various subflows and select **Save**. **f.** Select the preview icon ⓘ next to the **Con nection & Credential** field. **g.** Enter connection and credential details for this integration profile by selecting the **Cre**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration	Action
	ate New Connection & Credential related link. **h.** Select **Create**. **i.** On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration. The ServiceNow instance displays an error message stating that the connection validation isn't successful. **j.** Select **Troubleshoot** on the error message. The ServiceNow Otto for SAM application generates the troubleshooting details that contain the error summary and suggested resolutions. Each error that's listed in the Error Summary section has a corresponding troubleshooting guidance in the Suggested Resolutions section.



4. Use the suggested resolutions and select **Validate Connection.**

   If the connection validation isn't successful, you can select the **Troubleshoot** button to regenerate the error summary and resolution guidance.

5. After the connection validation is successful, publish the integration profile by selecting **Publish**.

Automate user resolution for SaaS license management using ServiceNow Otto for Software Asset Management (SAM)

Automatically generate user resolution rules to ensure accurate mapping of incoming SaaS subscription data to SAM users.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: sam_integrator

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

Note: The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the Australia Patch 4 release, Azure OpenAI is the default model provider for the SaaS user resolution generative AI skill.

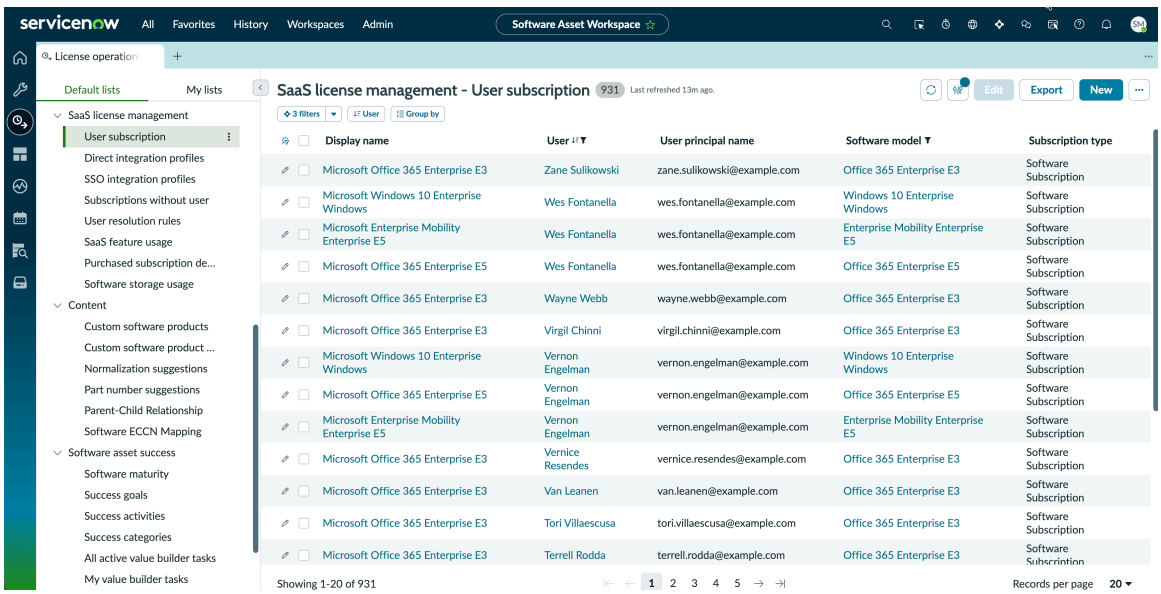
Ensure that you have the latest compatible versions of the Software Asset Management plugin and the Software Asset Management - SaaS License Management plugin.

After activation, the SaaS user resolution skill operates automatically generating user resolution rules and resolving users without any manual intervention. To view the resolved users and the corresponding user resolution rules, perform the following steps.

Procedure

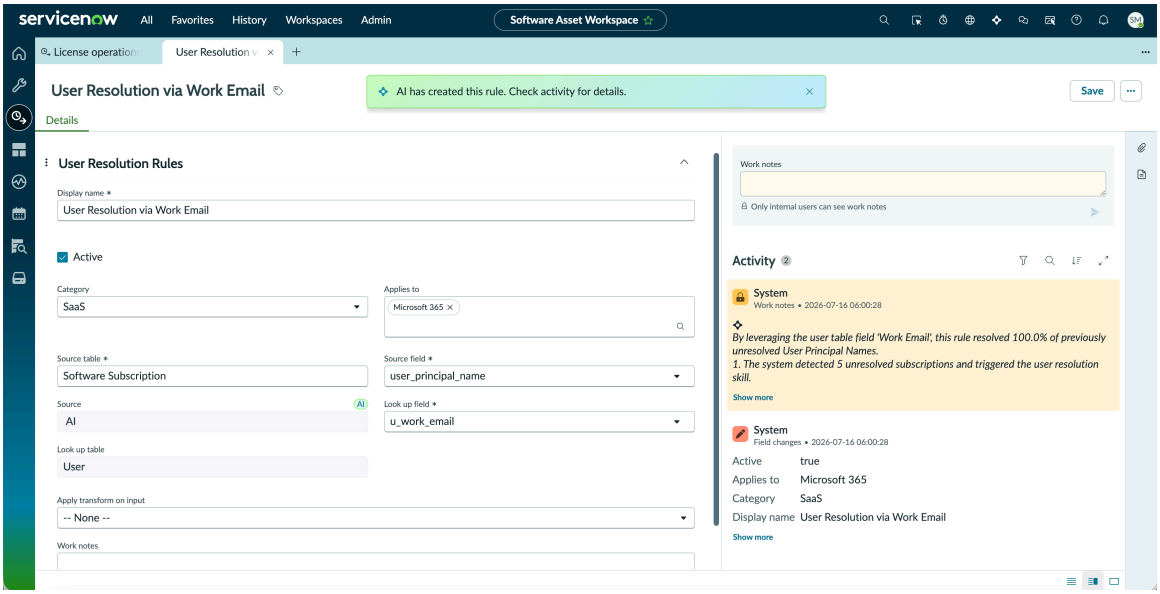
1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. Select the License operations view.
3. Select **SaaS license management** > **User subscription**.

   In the User subscription page, all the user names are automatically resolved.



4. Select **SaaS license management** > **User resolution rules** to view the new user resolution rule that got created.
5. Open the user resolution rule to view additional details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



The AI indicator next to the **Source** field and the prepopulated value **AI**, signifies that the rule is automatically generated by the SaaS user resolution generative AI skill.

For details on the rule, refer to the AI Activity log under Activity center that provides a detailed log of the steps involved in creating the rule. For details on all the fields, see User resolution rule fields.

You can also refer to the Activity center in the Software asset overview view for any new rules created. Additionally, if a rule isn't marked **Active**, it shows up as **One marked inactive Review needed** under the SaaS user resolution section. If you go back to the rule and mark it as Active, save the rule, return to the Software asset overview view, and reload the **One marked inactive Review needed** no longer appears.

Extract entitlements from software contracts using ServiceNow Otto for Software Asset Management (SAM)

Reduce manual effort by leveraging generative AI to automatically create entitlements by extracting information from software contracts.

Before you begin

Role required: sam_user

Note: Creating contracts requires sam_admin role.

About this task

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

Note: The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the Australia Patch 4 release, Azure OpenAI is the default model provider for the SaaS user resolution generative AI skill.

With the Contract entitlement data extraction skill being activated by default, you can upload software contracts in the Software Asset Workspace to automatically generate entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

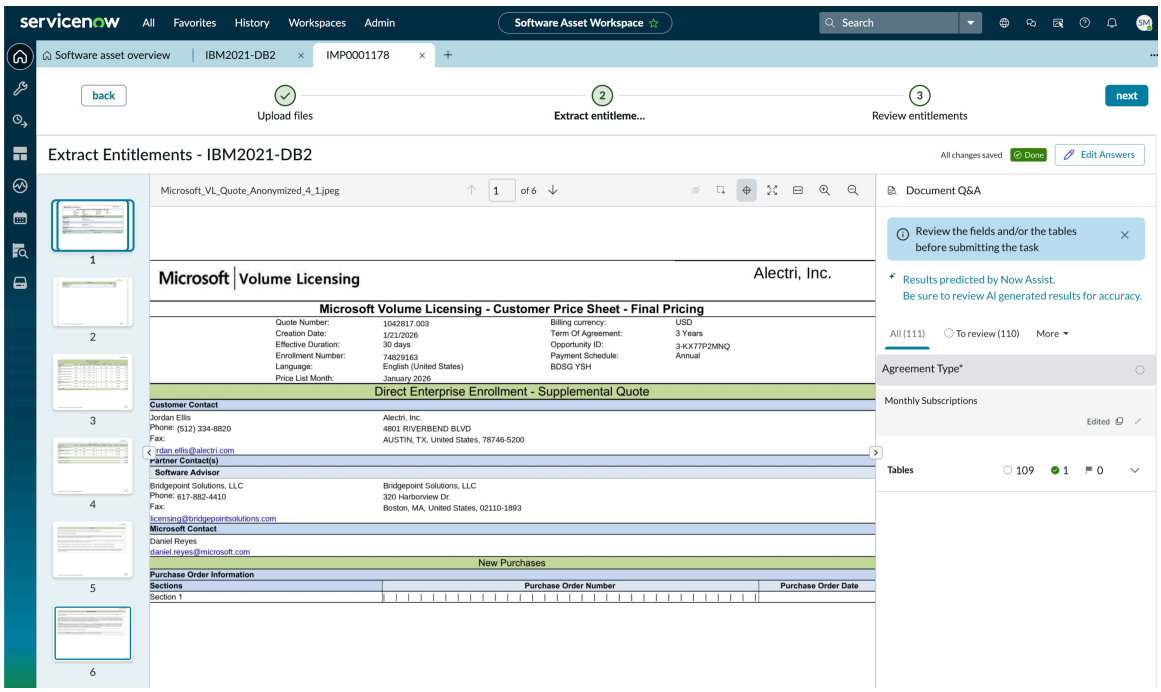
You can extract data related to entitlements from an existing or a new contract and only from contracts where the contract model is a software license.

Procedure

1. Navigate to **Software Asset Workspace** > **License operations** > **Contracts** > **Software contracts**.
2. Open an existing software contract that is in an active state and where the contract model is a software license.
   Select **New** to create a contract. Only the sam_admin role can create a contract.
3. Select **Import contract document**.
4. **Optional:** Select a publisher from the **Publisher** drop-down.
5. Select **Add file** to attach a PDF or image of a contract.

   Note: The file format should be PDF, JPG, JPEG, or PNG and the file size per attachment shouldn't exceed 4 MB. The maximum page count is 10 pages for images and 25 pages for PDFs.

6. Select **Upload**.
7. Select **Next** to go to the Extract entitlements page.
   A message appears informing you that the extracting process is in progress.
8. Select **Next** once the extraction process is complete.

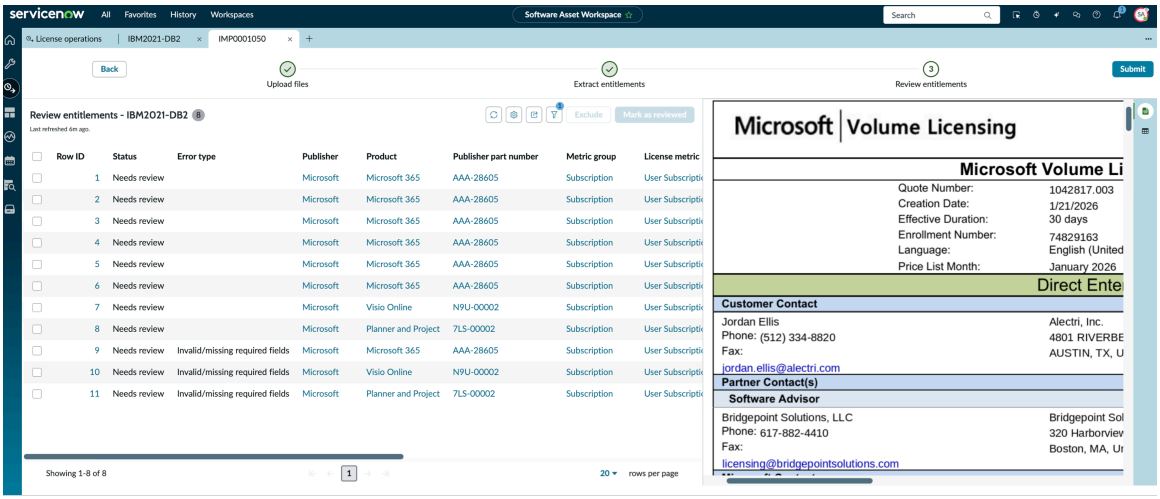


9. Select the Open tables down arrow next to **Tables**.
10. Select **Entitlements**.
    Review the generative AI predictions for fields and tables. You can edit any predictions that weren't captured by DocIntel on this page. You can use DocIntel's Draw mode to move or reorder the columns. You can also make edits directly in the table.
11. Select **Submit** after you have reviewed all the predictions on the page.
    The Confirm field predictions message box opens.
12. Select **Confirm and submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The status changes from **Review** to **Done**. Every time you make changes and select **Submit**, the data extracted from DocIntel changes.

13. Select **Next** to lock in the data and go to the Review entitlements page.



The Review entitlements page opens with the entitlement import error records. For each entitlement extracted from the contract document, an entitlement import record is created. The page also shows the PDF or images you uploaded.

If you selected a publisher in step 4, the system identifies and displays the best matches according to that publisher.

You can perform inline editing in the list view for all records that are in the **Needs review** status.

14. Select one of the following options:
    - **Mark as reviewed** for records that have no errors. Additionally, if a record has errors that you don't want to ignore, open that record, rectify the errors, and then select **Mark as reviewed**. If you select **Mark as reviewed**, the status changes to **Reviewed**.
    - **Ignore** to ignore the errors for a record. Once you ignore a record, the record becomes read only and the status changes to **Ignored**. You can select **Edit** on the record form to change the status of the record to **Needs review** or **Reviewed**. **Edit** appears only for records that are in the **Ignored** or **Reviewed** status.

      Note: If a record is marked as **Ignored**, an entitlement doesn't get created.

15. Select **Submit** after you have reviewed and corrected the errors in all the records. The entitlements are successfully created.

Resolve entitlement import errors by using ServiceNow Otto for Software Asset Management (SAM)

Reduce manual effort when reviewing entitlement import errors in the Software Asset Workspace using ServiceNow Otto for SAM AI skills.

Before you begin

The following plugins and store applications must be installed from ServiceNow Store to use the AI skills:

- ServiceNow Otto for Software Asset Management (SAM) (sn-now-assist-sam)
- Software Asset Management AI Advance (sn-ai-sam-advance)
- Content library portal (sn-itam-contlookup)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role required: sam_user or sam_admin

About this task

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

Note: The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the Australia Patch 4 release, AWS Claude is the default model provider for the Product match reviewer and Google Gemini is the default model provider for the Software normalization AI skill.

When you import software entitlements using the Import bulk entitlements in the Software Asset Workspace feature, some rows may contain publisher or product data that standard content matching can't resolve. Unresolved publisher or product data prevents the entitlement import from completing successfully.

To resolve this issue, ServiceNow Otto for SAM provides the following AI-powered skills that normalize publisher and product values:

- Software normalization
- Product match reviewer

After the file import completes, if any publisher or product names in the import file are misspelled, incomplete, or unrecognized, the skills run automatically to identify the correct values and provide corrections.

Procedure

1. Navigate to **All** > **Software Asset** > **Software Asset Workspace**.
2. Select **Create entitlement**.
3. In the Create new entitlement dialog box, select **Import multiple entitlements from an Excel file**.
4. Select **Next**.
5. Upload a Microsoft Excel file.
   For more information about importing multiple entitlements, see Import bulk entitlements in workspace.

   Note: The error resolution for the **Product** and **Publisher** fields applies only when the **Import Type** field value is selected as **Standard Import document**.

   After the file import completes, the following two skills run in sequence to provide correction suggestions for unresolved publisher or product data.

Entitlement import error resolution skills

Skill	Details	Output
Software normalization	Identifies canonical publisher and product names from discovered software data in	Canonical publisher and product names based on discovered software value

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Skill	Details	Output
	the Content Library. This skill uses LLM (large language model)-driven knowledge to standardize raw, incomplete, or unrecognized publisher and product values submitted during entitlement import.	in the Content Library are displayed in the **Product** and **Publisher** fields of the imported entitlement record.
Product match reviewer	The Product match reviewer skill runs after the Software normalization skill completes successfully. **Note:** It runs only when the Software normalization skill is unable to find the correct product match from the Content Library. The Product match reviewer skill performs an AI-powered search and selects the correct product match. If no reliable match is found, the skill returns an empty result.	○ The confirmed product match from the AI-based content search result is displayed for the entitlement record **Product** field. ○ If no reliable match is found for the **Product** field, the skill returns an empty result.

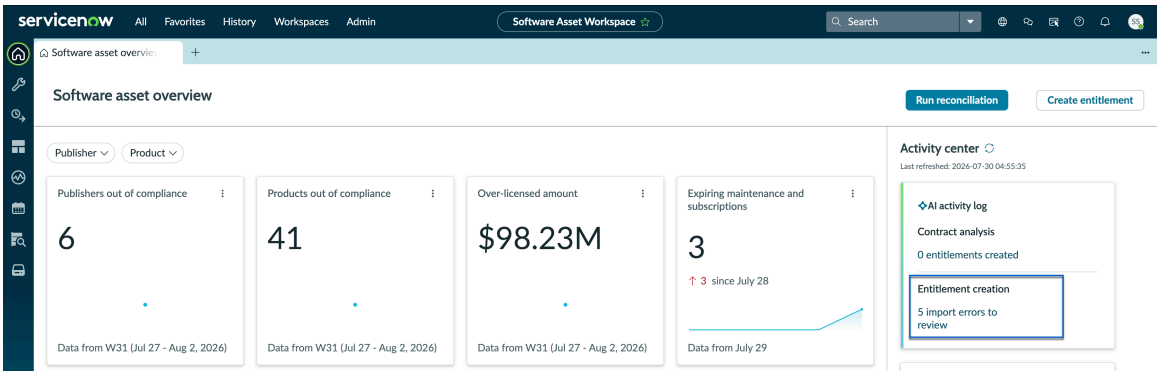
6. Select the **Errors** tab.
   The **Errors** tab displays all entitlement import error records that require human attention. These records fall into the following categories:
   - Records where the AI skills have provided a suggested correction that requires your review. In the Error status column, the Otto icon indicates that the record contains an AI suggestion.
   - Records where the AI skills were unable to resolve the import error and provide a correction. Review these records and manually update the publisher or product values to resolve the error.
7. Select the number link to open the import error record.
   If the import error record contains an AI-suggested value, an Otto icon is displayed on the field, showing both the AI-corrected value and the original value from the import file.
8. Review the AI-corrected value for each field.
9. Select **Import** to save and import the reviewed record.

Result

- After the import is complete, an entitlement record is created and displayed on the **Entitlements** tab.
- The import error record is removed from the **Errors** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The Entitlement creation widget in the AI activity section of the Software Asset overview page is updated. The widget displays the number of entitlement import errors requiring review. Select the link to view the Entitlement Import Error list.



Related topics

Import bulk entitlements in workspace

Classify and normalize software spend transactions by using ServiceNow Otto for Software Asset Management (SAM)

Classify imported spend transactions to identify software purchases and normalize the derived raw publisher and raw product by matching them to existing publisher and product records. This automation reduces manual effort and improves spend reporting accuracy.

Before you begin

Role required: sam_user

The following plugins and store applications must be installed on your ServiceNow instance to use the AI skills:

- ServiceNow Otto for Software Asset Management (SAM) (sn-now-assist-sam) app
- Software Asset Management Professional (com.snc.samp) plugin
- Software Asset Workspace (sn_sam_workspace) app
- Software Asset Management - Spend Detection (com.sn_sam_spend) plugin

AI Search must be activated on your ServiceNow® instance. For details, see the AI Search activation steps in Install ServiceNow Otto for Software Asset Management (SAM).

About this task

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

ServiceNow Otto for SAM classifies and normalizes spend transactions through the Spend transaction software classification skill and the Spend transaction software normalization skill. The skills run automatically as part of the Software Spend Detection workflow whenever spend transactions are imported or manually created.

Note: AI-generated classifications may contain inaccuracies. Review AI-classified transactions to verify accuracy before using them for compliance or financial reporting.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Import spend transactions or manually create a spend transaction.

   For details, see:

   - Import financial transactions
   - Create a spend transaction manually

2. After the *SAM - Label Spend Transactions* scheduled job runs, navigate to **Software Asset Workspace** > **License operations** > **Software spend detection** > **All transactions** to review the classified transactions.

   The list shows each transaction's state, publisher, product, and prediction method. For details, see Managing software spend in the Software Asset Workspace and AI-powered software spend detection.

Using Software Asset Workspace

Use the Software Asset Workspace, the intuitive and streamlined user interface of the Software Asset Management application, to manage software licenses, compliance, and optimization.

Create entitlements in workspace

Create entitlements in the Software Asset Workspace to enter your license details and allocate purchased software rights to users or devices.

Before you begin

These instructions are for using the standard form for creating software entitlements one at a time. You can also use the step by step approach of a guided walk-through for creating entitlements. If you already have software entitlement details entered in a spreadsheet, you can also import them using the bulk import functionality.

When you start creating the entitlement it is in the **build** status. Once you publish the entitlement, the status changes to **in use** and makes the entitlement eligible to be included in the reconciliation process.

If you installed SaaS License Management, a software model is generated automatically after you create an integration profile. Create an entitlement for the software model to track software used against software owned.

if you installed the SAP publisher pack, see Create entitlements for SAP.

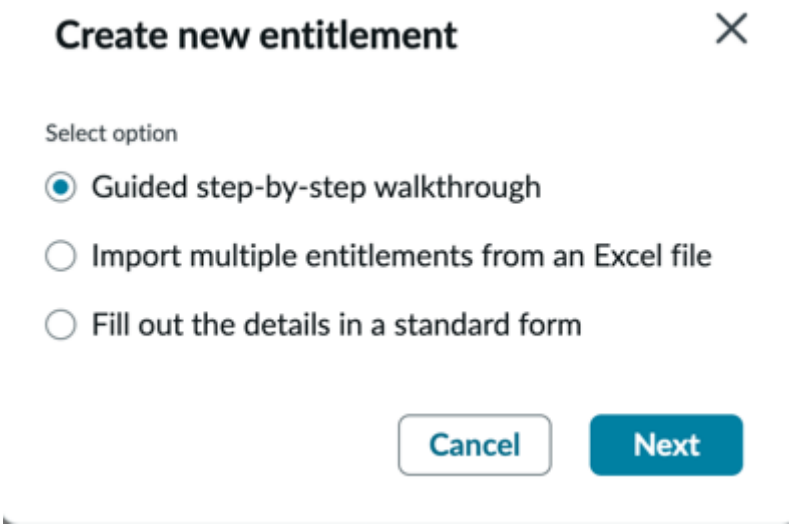
You can also create entitlements for RHEL and Citrix publisher packs. For details on the entitlement form fields for RHEL, see Software Entitlement form.

Role required: sam_admin or sam_user

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace**.
2. Select **Create entitlement** to open the Create new entitlement dialog box.
   You can also navigate to the Create new entitlement dialog box from **Software asset** > **Software Asset Workspace** > **License operations**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



3. Select **Fill out the details in a standard form** and then select **Next**.
4. In the Create New Software Entitlement page, fill in the fields.
   For a detailed description of the fields, see Software entitlement fields.
5. Select **Save**.
   After you save the entitlement, the **Allocations**, **General**, **Financial**, and **Contracts** tabs appear on the page. You can now add details in these related tabs.
6. Once you have entered the required details, select **Publish**.

   The entitlement is created and state of the entitlement is changed to **in use** from **build**. The entitlement is ready to be picked up for the reconciliation process.

   You can perform additional configuration on the new entitlement by entering details in the other tabs such as Contracts, Downgrade Rights, Expense Lines, Entitlement History. For a detailed description of the fields in these tabs, see Software entitlement fields.

Related topics

Software entitlement fields

Create device allocation

Create maintenance entitlements in workspace

Define license details, for all publishers other than Microsoft in the Software Asset Workspace. Create maintenance entitlements to manage all your software license maintenance needs such as start and end dates of your contracts and software upgrades.

Before you begin

Role required: sam_user or sam_admin

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace**.
2. Click **Create entitlement** to open the Create new entitlement dialog box.
   You can also navigate to the Create new entitlement dialog box from **Software asset** > **Software Asset Workspace** > **License operations**.
3. Select **Standard form** and then click **Next**.
   The Create New Software Entitlement page opens and the entitlement is in build status.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. On the Create New Software Entitlement page, fill in the mandatory fields and select **Maintenance** in the **License type** field.

   For a detailed description of all the fields, refer to Software entitlement fields.

   If the **Next Version** field is populated in the software model that the maintenance entitlement is associated with and the metric group selected in the maintenance entitlement is **Common**, then the maintenance entitlement is updated with the next version of the software model. Next version is applicable only for the **Common** metric group.

5. Once you have entered the required details, click **Publish**.
   The maintenance entitlement is created and state of the entitlement is changed to **in use** from **build**. The maintenance entitlement is ready to be picked up for the reconciliation process.

   Note: If you purchase a perpetual entitlement and associate only some of the rights of that entitlement with a maintenance entitlement, your perpetual entitlement is automatically split into two entitlements. For example, you purchased a perpetual entitlement with 50 active rights (E1). You associate 20 of these rights with 20 rights of a maintenance entitlement. Your E1 perpetual entitlement is now automatically split into two entitlements: one perpetual entitlement (E1) with 20 active rights (and 50 purchase rights) associated with 20 rights of the maintenance entitlement (M1) and another perpetual entitlement (E2) with 30 active rights without any maintenance association and no purchased rights.

6. You can perform additional configuration on your new maintenance entitlement record.

   For a detailed description, see Software entitlement fields.

   You can't add user or device allocations for maintenance entitlements.

   a. Enter information pertaining to finance such as the vendor from which the asset was purchased, the invoice number, in the **Financial** tab.

   b. Enter information relating to contracts such as the lease contracts, the expiration date of the warranty in the **Contracts** tab.

   c. Link related perpetual entitlements to your maintenance entitlement from the **Related Entitlements** related list.

      i. Select the **Related Entitlements** related list and then click **New**.

         The Create New Related Entitlement form opens in a new tab.

      ii. On the form, fill in the fields.

Create New Related Entitlement form

Field	Description
Active rights	Number of rights that you want to grant to the related perpetual entitlement.
Software Entitlement	Software entitlement that you are linking the related perpetual entitlement to. This field populates automatically.
Related Entitlement	Related perpetual entitlement that you want to link.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Domain	Domain that the related perpetual entitlement applies to. The default value is **global**.

iii. Click **Save**.

To remove the relationship between the perpetual and maintenance entitlement, remove the entitlement from the **Related Entitlements** related list in the maintenance entitlement.

If the entitlement has split and you've deleted the maintenance entitlement, the perpetual entitlement is not removed.

d. View the downgrade rights for the software model associated with the maintenance entitlement in the **Downgrade Rights** related list.

e. To manage license keys, and specify which licenses keys are allocated to entitlements, click the **License Keys** related list

f. To track the cost of your software over its lifecycle, click the **Expense Lines** related list.

g. To view the history of all maintenance entitlements that you have purchased, click the**Entitlement History** related list.
For example, if you purchased two maintenance entitlements, M1 (which is now retired) and M2 (currently in use), the Entitlement History related link displays both M1 and M2.

h. To view the history of the newly upgraded software model related to your entitlement and the previous software model, click the **Upgrade History** related list.

7. Once you have completed filling in the additional configuration details, click **Save**.

Create Microsoft Software Assurance entitlements in workspace

Define license details for Microsoft Software Assurance (SA) in the Software Asset Workspace to manage your contracts start and end dates, software upgrades, and related software entitlements.

Before you begin
Role required: sam_user or sam_admin

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace**.
2. Select **Create entitlement** to open the Create new entitlement dialog box.
   You can also navigate to the Create new entitlement dialog box from **Software asset** > **Software Asset Workspace** > **License operations**.
3. Select **Standard form** and then select **Next**.
   The Create New Software Entitlement page opens and the entitlement is in build status.
4. On the Create New Software Entitlement form, fill in the required fields and select **SA** in the **License type** field.

   You must enter the number of rights to be granted for the SA entitlement in the **Active rights** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For a detailed description of the fields related to all entitlements, see Create entitlements in Software Asset Management classic.

Note: You can't add user or device allocations for SA entitlements.

5. Select **Publish**.
An entitlement appears in the Software Entitlement list.

Note: If you purchase a perpetual entitlement and associate only some of its rights with an SA entitlement, your perpetual entitlement is automatically split into two entitlements. For example, you purchased a perpetual entitlement with 50 active rights (E1). You associate 20 of these rights with 20 rights of a SA entitlement. Your E1 perpetual entitlement is automatically split into two entitlements: one perpetual entitlement (E1) with 20 active rights (and 50 purchase rights) associated with 20 rights of the SA entitlement (M1) and another perpetual entitlement (E2) with 30 active rights without any SA association and no purchased rights.

6. To perform additional configuration, select your new software entitlement record from the Software Entitlements list.

   a. To link related perpetual and SA entitlements, use the following steps:

      i. Select the Related Entitlements related list and then select **New**.

      The Create New Related Entitlement form opens in a new tab.

      ii. On the form, fill in the fields.

Create New Related Entitlement form

Field	Description
Active rights	Number of rights that you want to grant to the related perpetual or SA entitlement.
Software Entitlement	Software entitlement that you're linking the related perpetual or SA entitlement to. This field populates automatically.
Related Entitlement	Related perpetual or SA entitlement that you want to link.
Domain	Domain that the related perpetual or SA entitlement applies to. The default value is **global**.

      iii. Select **Save**.

      To remove the relationship between the perpetual and SA entitlement, remove the entitlement from the Related Entitlements related list in the SA entitlement.

      If you delete either the perpetual or SA entitlement that is linked, the other entitlement isn't deleted.

      If the entitlement has split and you have deleted the SA entitlement, the perpetual entitlement isn't removed.

   b. To link your software to a newer version as part of your maintenance contract, select the Upgraded Entitlements related list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: This related list is only available if you selected **Step-up** as the entitlement license type.

If the **Next Version** field is populated on the software model, entitlements with active SA are updated to the new version of the software model.

After you have linked your related entitlements, if there aren't enough SA rights to cover the perpetual entitlement rights, an error message displays.

c. To view all previously related entitlements that are linked, select the Entitlement History related list.

Note: Validation is run against the active rights of all related entitlements automatically. If there's an error with the calculation, a message with additional information on how to resolve the problem is displayed.

7. Select **Update**.

Import bulk entitlements in workspace

You can import multiple entitlements at one go in the Software Asset Workspace.

Before you begin

Role required: sam_user or sam_admin

About this task

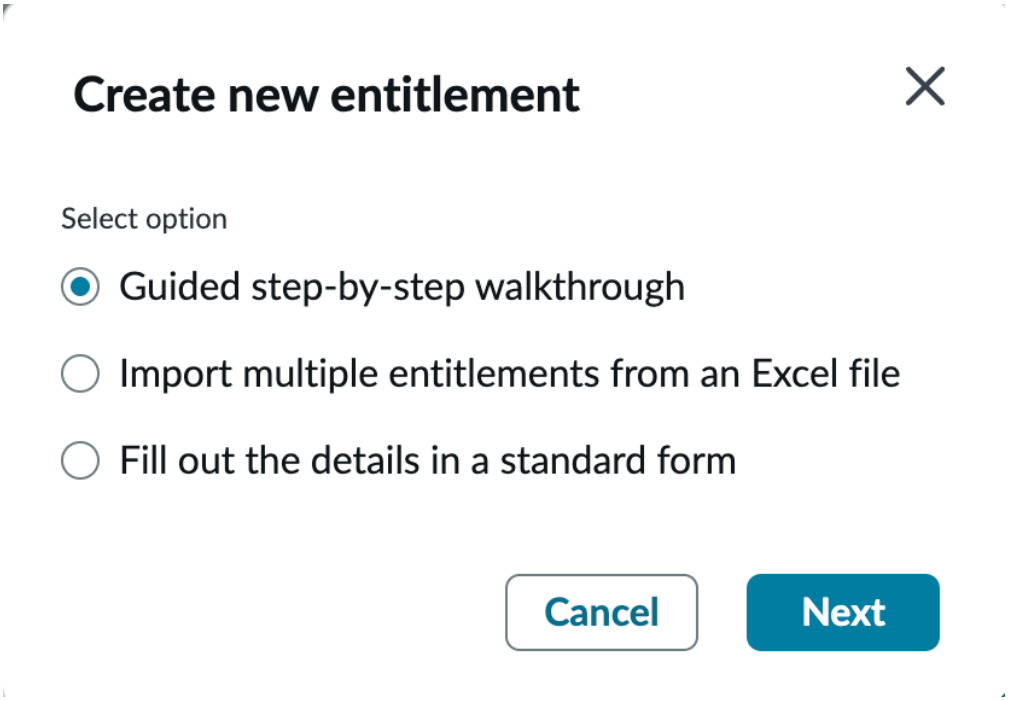
The entitlement import records are stored in the Entitlement import [samp_bulk_import] table. The **Publisher part number**, **Product**, and **Publisher** columns in the Entitlement import [samp_bulk_import] table offer drop-down lists for value selection.

You can leverage the Activity center in the Software asset overview landing page to view import errors and the import status.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace**.
2. Select **Create entitlement**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



3. In the Create new entitlement dialog box, select **Import multiple entitlements from an Excel file** and select **Next**.
4. In the Create New Entitlement Import page, select **Download template** to download a spreadsheet template (.xlsx).

   You can add software entitlement fields to the template to include additional fields in your import. Add each field as a new column in the template. The column name must match the field label exactly. Besides the Publisher, Product, Version, Edition, Platform and Language, the Install condition name column is also taken into account to find the correct software model while importing entitlements.

   You can include base system software entitlement fields as well as your custom software entitlement fields. Custom choice columns (where the type is Choice) created in the Asset [alm_asset] or Software Entitlement [alm_license] table are also supported.

   Note: By default, the **Unit cost** column in the spreadsheet takes into account the currency that your system is set to. However you can manually change the currency and the Software Asset Management application will honor the currency that you specify. To specify a currency, enter the currency code followed by a semicolon and the cost. For example, EUR ; 200. Valid currency codes are the ones listed in the Currency [fix_currency] table and have the **Active** column set to true.

   In the spreadsheet template, if the **Publisher Part Number** column doesn't have a value or the value is invalid and the **Publisher** and **Product** columns have valid values, then during the import process, a software model is automatically created. The source type *`entitlement_import`* gets stamped to the automatically created software model. The system property com.snc.samp.sm_creation_on_entitlement_import is used to control the software model creation on entitlement import. If you don't want the automatic creation of software models during the import process, you can set this property to false.
5. Enter the entitlement details in the template and select **Attach File** to upload the spreadsheet. Once the file is uploaded, the name of the file appears and the **Description** field is automatically populated. You can change the description to make it more specific.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select **Import**.

   An import record is created that retains the history of the upload for you to view later.

   A confirmation message appears informing you that the import of entitlements is in progress. Once the import record is processed, the **Status** field displays one of the following values: **Completed**, **Completed with errors**, or **Failed**.

7. Select the link in the confirmation message to check the status of the record.
   The License operations view appears displaying the entitlement record in the Entitlement Import page
8. Open the entitlement record to view its details.
9. Click the **Entitlements** tab to view the list of entitlements that got successfully created.

   Note: The **Entitlements** tab only appears if the **Status** field displays the values, **Completed**, or **Completed with errors**.

10. If any errors occur and the status says **Completed with errors**, click **Review import errors**.

    The Review entitlement import errors page opens containing two tabs:

    - **Import errors**: displays records whose error status is **Needs review**.
    - **Relate entitlements**: lists entitlements, such as maintenance entitlements, that are in the build state and can be linked to the base entitlements.

11. Select the import error record to view the errors.

    If an import error record doesn't have a software model but the **Publisher** and **Product** fields have valid values, then on selecting **Import**, a software model is automatically created and the status of the record changes to **Manually fixed**.

    For a detailed description of the entitlement import error fields, see Entitlement import error fields

12. Correct the errors and select **Import**.
    The entitlement is successfully created. Further processing of the entitlement continues such as validation of downgrade models for the entitlement. For more information on resolving errors, see Entitlement import error actions.

Install Software Asset Management Guided Experiences

Install the Software Asset Management Guided Experiences (sn_sam_playbook) application for step-by-step guidance for completing tasks in your daily software management activities.The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Activate Software Asset Management Professional Master Workspace (com.sn_samp_master_ws) plugin. This plugin will internally activate the Software Asset Management Professional (com.sn_samp_master) plugin and Software Asset Workspace (sn_sam_workspace) store application.

Role required: sam_admin or sam_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

The following items are installed with the Software Asset Management Guided Experiences application:

- Plugins
  - Software Asset Management Professional (com.snc.samp)
  - com.glide.playbook_experience.config
- Store applications:
  - Playbook Experience (sn_playbook_exp)
  - Playbook Experience Components (now_playbook_exp)
  - Software Asset Workspace (sn_sam_workspace)
- Tables

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Software Asset Management Guided Experiences (sn_sam_playbook) 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.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they'll be installed, are currently installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install the Software Asset Management Guided Experiences application.
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Create entitlements using the guided walk-through

Use the guided walk-through playbook for a step-by-step process of creating entitlements.

Before you begin

You can create perpetual entitlements with or without a publisher part number. You can also create SaaS entitlements to manage software subscriptions of your pure SaaS and hybrid applications.

The guided walk-through takes you through the entire process of creating an entitlement. Initially the entitlement is in the **build** status when you start creating it. Once you publish the entitlement, the status changes to **in use** and makes the entitlement eligible to be included in the reconciliation process.

The process of creating an entitlement is organized into lanes. The lanes appear in the left pane of the page. Each lane has a few tasks that you're asked to complete. After you complete a task, select **Mark Complete** to move to the next task. You can select **Save** at any time in the process

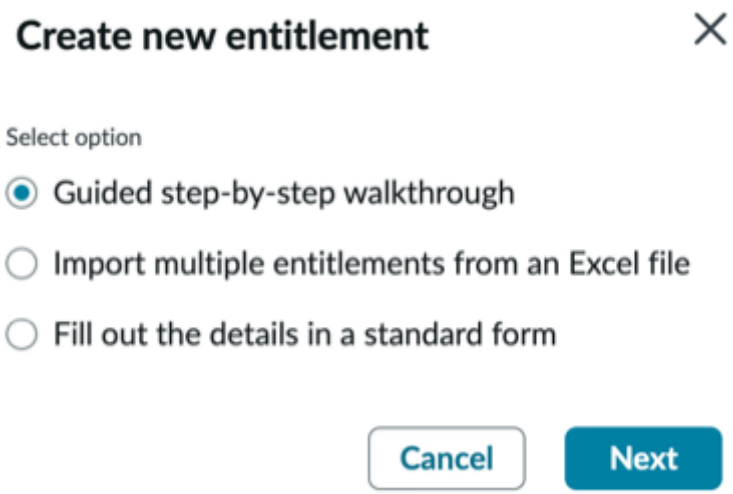
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

to save your changes and return to the playbook later. You can also select **Cancel** to abort the entitlement setup at any point of time. While you're performing a particular task, a status of in progress appears for that task. As you mark a task complete, the status of that task changes to complete. Once you complete all the tasks in a lane, you move to the next lane.

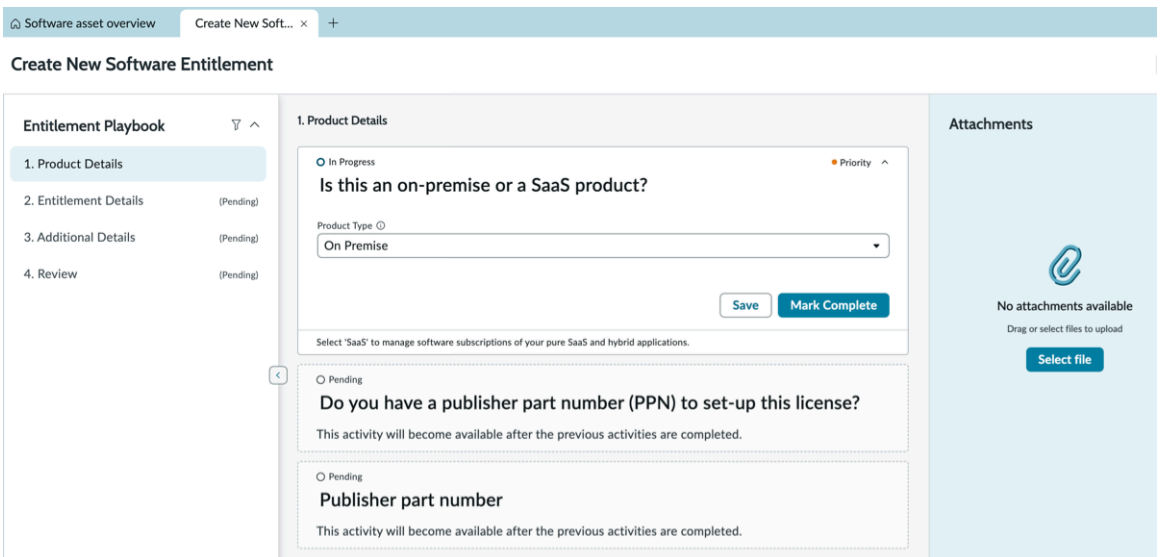
Role required: sam_user or sam_admin

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace**.
   The Software asset overview page appears.
2. Select **Create entitlement**.



3. Select **Guided step by step walk-through** and select **Next**.
   The Create New Software Entitlement page opens and the status of the entitlement is in **build**.



4. Select whether you're creating an entitlement for an on-premises product or for a SaaS product.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If you select **on-premise**, enter the fields listed in the following On-premise entitlement table.
- If you select **SaaS**, enter the fields listed in the following SaaS entitlement table.

Note: You're asked to select on-premise or SaaS only if the Software Asset Management - SaaS License Management Integrations (sn_sam_saas_int) plugin is activated. If this plugin is not activated, then the product type is automatically selected as on-premise.

On-premise entitlement

on-premise entitlement fields	Description
Do you have a PPN	Select if you have a publisher part number (PPN) for setting up the entitlement.
Publisher Part number	Enter the PPN if you have one or otherwise create a custom PPN by clicking the link in the informational message to take you to the Custom Part Numbers page.

SaaS entitlement

SaaS entitlement fields	Description
Has an integration profile being set-up	If you have an integration profile already set-up, select it. Otherwise, select the appropriate link to create a direct or a SSO integration profile. **Note:** Integration profile is needed to view software usage information and optimize stale licenses.
Are you using a direct or SSO integration profile for this SaaS product	Select the type of profile, direct or SSO, that you're using for this SaaS product.
Select an integration profile	Based on the type of profile you specified, select an integration profile.

5. Select a software model for the entitlement.
   Once you complete all the tasks in the Product Details lane, you can move to the Entitlement Details lane.
6. Select **Entitlement Details**.
   If you entered a PPN, then the metric group, agreement type, and license type are automatically populated. You can change the values if required.
7. Enter a value in **Asset tag** to track the asset through its life cycle.
8. Select a value in **License metric** for the license group that the software license is counted against when reconciliation is run.
   If you select Per Core or Per Core (with CAL), you must enter values in the following fields:
   a. In **Rights per license pack**, enter rights associated with each pack that is purchased for Microsoft Per Core or Microsoft Per Core with CAL licenses.
   b. In **Number of packs**, enter the number of packs for Microsoft Per Core or Microsoft Per Core with CAL licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. Enter the number of rights purchased in **Purchased rights**.
   If you have specified a Microsoft Per Core or Microsoft Per Core with CAL license type, this field is automatically populated. This value is based on the values entered in the Rights per license pack field multiplied by the value in the Number of packs field.
10. Enter the cost of the software in **Unit cost**.
    Once you complete all the tasks in the Entitlement Details lane, you can move to the Additional Details lane.
11. Select **Additional Details**.
12. Enter the name of the company that this asset belongs to in **Company**.
13. Enter the location where the license is used.
    For example, you can specify a specific site, country, or region.
14. Enter the department of the person assigned to this software license in **Department**.
15. Enter the user or department with financial ownership of the asset in **Owned by**.
    The asset owner can be different than the manager.
16. Enter the financial details for the vendor in **Vendor**, **Invoice Number**, **Request Line**, **Purchased**, **Opened**, **GL account** and **Cost Center** fields.
17. Enter contract details in **Lease Contract**, **Warranty expiration**, **Support Group** and **Supported by** fields.
    After you complete all the tasks in the Additional Details lane, you can move to the Review lane.
18. Select **Review** to show all the details that you have entered in all the lanes.
19. You can choose to edit any field, otherwise select **Finish**.
20. Select **Publish** to publish this entitlement for use.
    The entitlement is created and state of the entitlement is changed to **in use** from **build**. The entitlement is ready to be used for the reconciliation process.

Create a software model in the Software Asset Workspace

Create a software model in the Software Asset Workspace. Add product details that are used to connect software rights that you purchased with software installations that are discovered on your system.

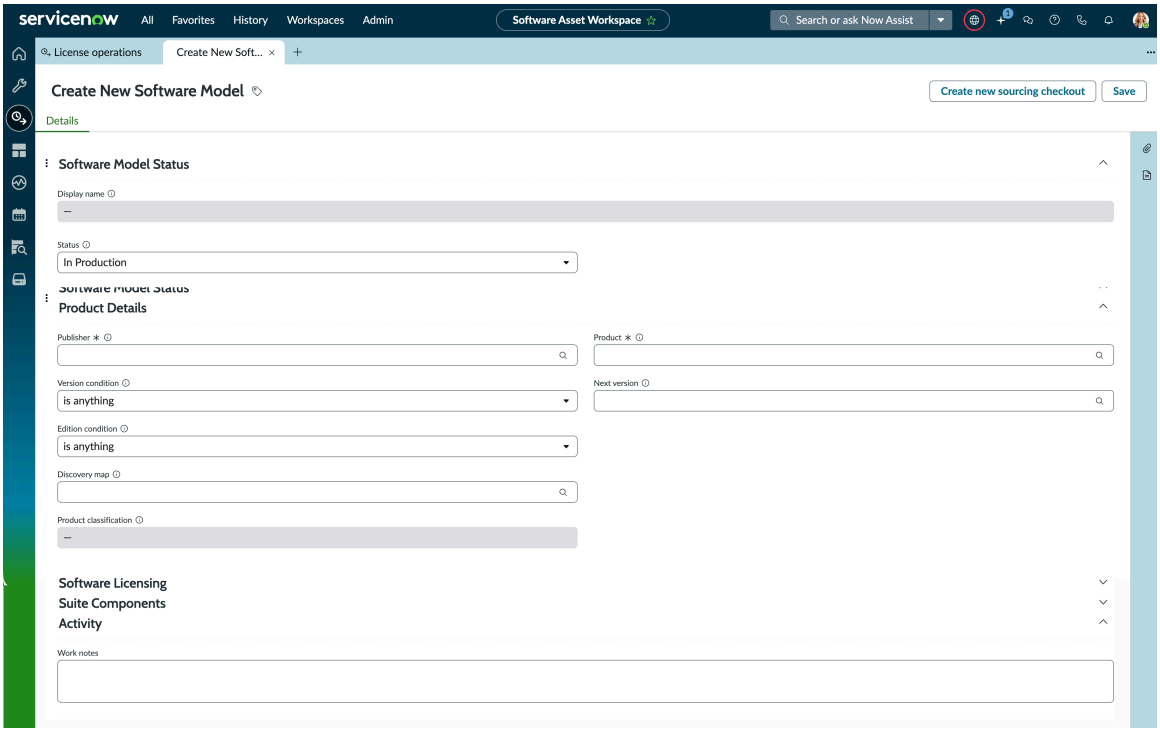
Before you begin
Role required: sam_user, sam_admin, or model_manager

About this task
You can manually create a software model. However, you can leverage the Software Asset Management Content Service Library to automate the creation of software models through their relationship to software entitlements. While creating or importing a software entitlement, specifying a publisher part number automatically creates a software model (if needed) or links to an existing software model.

You must manually create a software model if a publisher part number isn't available, or a publisher part number doesn't exist in the Content Service Library, or if you are creating a software model for a custom product.

Procedure
1. Navigate to **All** > **Software asset** > **Software Asset Workspace**.
2. Select the **License operations** view.
3. Under the Licensing section, select **software models**.
4. Select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



5. On the Create New Software Model page, fill in the details in the fields.
   See Software model fields.
6. Select **Save**.
   After you save the software model, the **General**, **Suite Components**, **Suite Parents**, and the **Product Catalog** tabs appear on the page. You can now add details in these related tabs.
7. Specify whether your software publisher is part of a suite.
   - To designate your software model as a suite parent, select Suite Parents and add all software included with the suite.
   - To designate your software model as a suite component, select Suite Components and add the parent suite.

   Note: If you have added a discovery map to your product details, predefined suites are used and suite components are created automatically for known suite parent.
8. View all the product lifecycles associated with your software model by selecting Software Product Lifecycle.
   Select **New** to create a custom product life-cycle.
9. View the override license cost for your entitlements by selecting Override License Cost.
10. Set the attribute value by selecting the Metric Attributes and complete the form.
    When you add an attribute value, entitlements with this publisher information associated with them automatically have the **Metric Group** field populated. Based on the metric group, only license metrics related to the publisher are available.
11. Associate your software model with a vendor by selecting Vendor Catalog Items and complete the form.
12. Specify the number of devices or users that are accessing the software by selecting Client Access and complete the form.
13. To create a new record for the software downgrade rights, select Downgrade Rights and complete the form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If your software model has a discovery map associated with it and the discovery map has downgrade rights, the downgrade rights are populated automatically. Downgraded versions of the software appear in a hierarchical list. For more information, see Downgrade Rights.

14. To allocate software licenses to all the members of an assignment group, select **Group Allocations** and complete the form.
    For more information about creating a group allocation record, see Create group allocations.
15. To enable self-service capabilities for the software that is associated with your software model, publish the software model to your service catalog.

    a. Select **Publish to Software Catalog**.
    The Publish <*software-model*> to Software Catalog dialog box opens.

    b. On the dialog box, set the **Category** field to **Software**.

    c. Select **OK**.

Run software reconciliation in the workspace

Reconciliation is run as a scheduled job (default is weekly), but you can also run reconciliation manually to reconcile software products in the Software Asset Workspace environment on-demand.

Before you begin

Reconciliation is run for products that have software entitlements or software installs. Grouping and subgrouping are supported so you can narrow the compliance results.

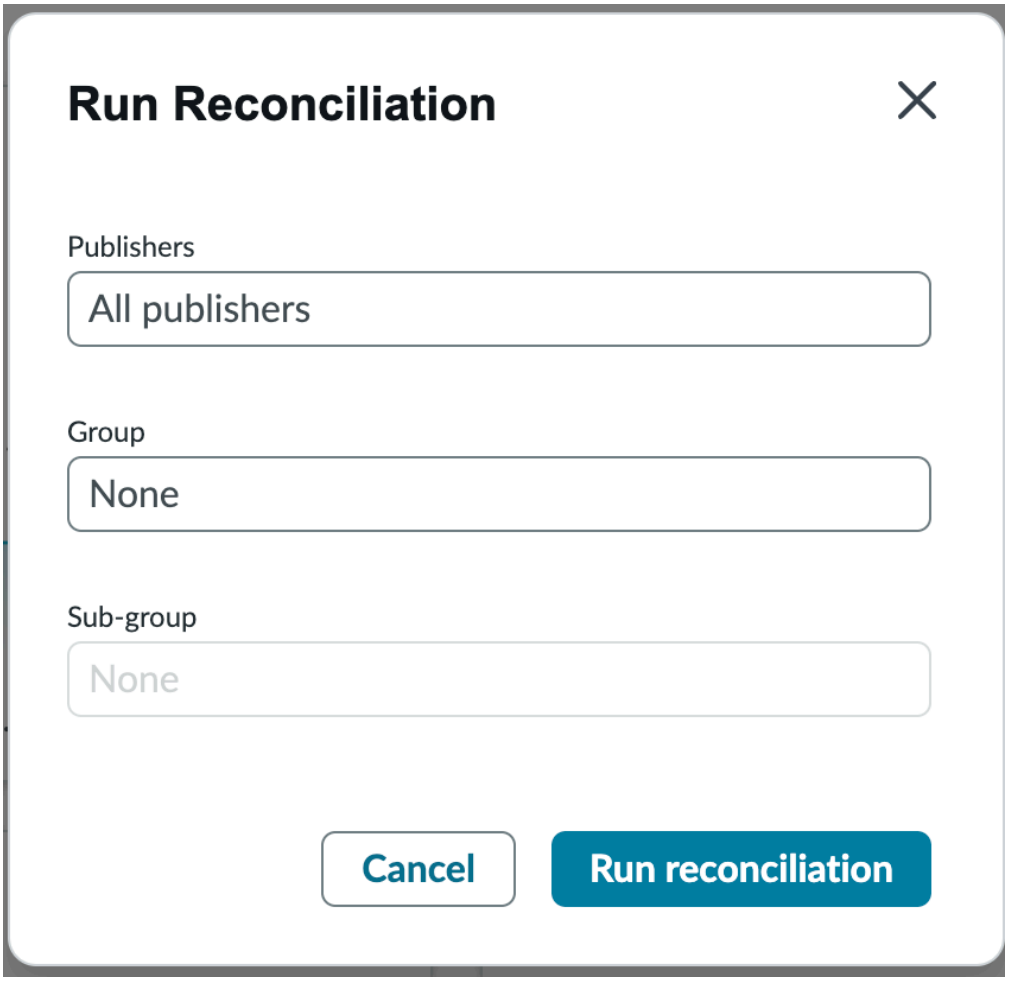
When running reconciliation manually, allow enough time for the process to complete. For faster results, narrow the scope by selecting specific publishers.

Role required: sam_user or sam_admin

Procedure

1. Navigate to the Run Reconciliation dialog box from either of the two ways:
   - **Software Asset Workspace** > **Software asset overview** > **Run Reconciliation**
   - **Software Asset Workspace** > **License usage** > **Run Reconciliation**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Note: If domain separation is enabled on your instance, then the Domain filter drop-down appears in the Run Reconciliation dialog box.

2. Select a particular publisher for which compliance should be calculated.
   You can also select all publishers.
3. To narrow results further, select a group or subgroup.
   Available group and subgroup values include None, Country, Department, Company, Region, and Cost Center.
4. Select **Run Reconciliation**.
   The reconciliation process may take some amount of time to complete. Once reconciliation is complete, the reconciliation results are shown in the **Reconciliation** tab.

Reconciliation results

Field	Description
Number	Unique identifying number that is generated during the reconciliation process.
Last reconciled	Date of last reconciliation run.
Status	Status of the reconciliation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Completed ○ In Progress ○ Failed
Ran for	All publishers, or specific publishers.
Publishers	Only shown if publishers were specified on which to run reconciliation.
Group	Group specified on which to run reconciliation. Values include **None**, **Country**, **Department**, **Company**, **Region**, and **Cost Center**.
Subgroup	Subgroup specified on which to run reconciliation. Values include **None**, **Country**, **Department**, **Company**, **Region**, and **Cost Center**.
Progress	Percent complete and progress bar for the reconciliation run.
Progress summary	Specific step within the reconciliation process. **Note:** This list column is not shown by default. You can personalize your list column settings to add it, if desired.
Updated	The date and time when the particular reconciliation process was completed.

Generate an Effective License Position (ELP) report

Generate an ELP report to gain detailed insights into the consumption details of different groups within your organization.

Before you begin
Role required: sam_user

About this task
An ELP report groups your data on existing reconciliation groups, by consumption, without having to rerun the reconciliation process.

Procedure
1. Navigate to **All** > **Software asset** > *Software Asset Workspace*.
2. Select **License usage**.
3. Select **ELP Grouping**.
4. Select **Create ELP Grouping Report**.
5. In the Select Grouping Choices box, enter a publisher, product, and group in their respective fields.
   You can optionally also select a subgroup from the **Subgroup** field to further divide your data.
6. Select **Confirm choices**.

   The results appear in the form of records in the ELP Grouping report results page. Every time you generate a report, a grouping result record gets created.

   At any given time, only one grouping result exists for a particular publisher and product.

7. **Optional:** Select a record to view the record details page.
   You can view the results for every ELP report that you have run in the **ELP License Position Grouping Reports** tab. Among other details, each record displays the average price, total

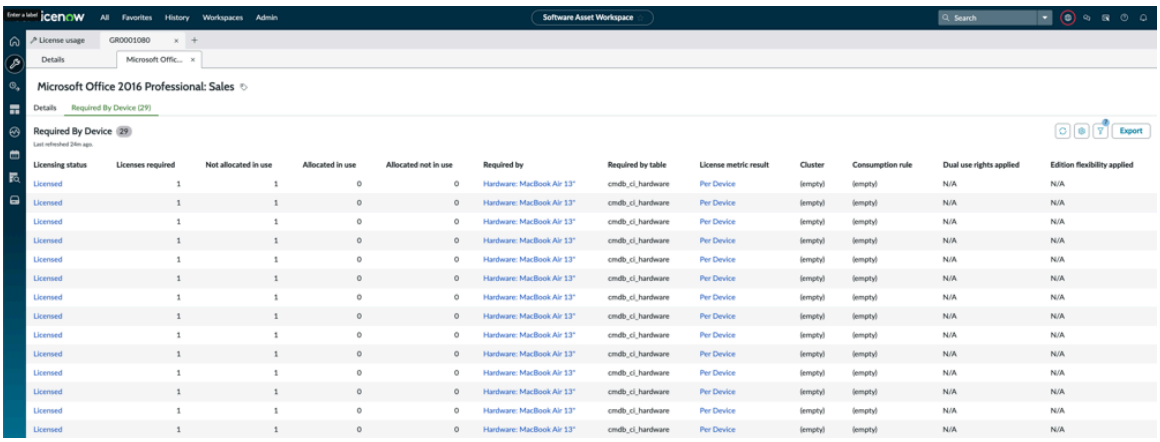
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

price, licenses required for each publisher and product, along with the edition and the group value.

8. Select the display name for a report to view the related list of the consumptions that contributed to the ELP grouping record.

   The Required by device related list shows you a list of devices that require licenses, within the specific category that you selected.

   The following screenshot is an example for Microsoft Office 2016 Professional, where Sales is the selected group. You can view the 29 devices from Sales that require licenses.



Create a custom deduplication rule

Create a custom deduplication rule to define how duplicate software installations are identified and matched within your organization.

Before you begin

Role required: sam_admin

About this task

Deduplication rules compare version numbers across installation records on the same device and determine which installation record is retained as primary. Create a custom deduplication rule to identify duplicate installation records on a device when the default **Major** version comparison doesn't match your organization's duplicate detection requirements. The Software Asset Management application uses this custom rule to match installations of the specified product according to your selected version comparison level. Duplicate installations matching this rule are grouped together, and the Software Asset Management application selects a primary installation based on discovery source reliability and data completeness.

Procedure

1. Navigate to *`Software Asset Workspace`* > **Administration** > **Deduplication rules**.
2. Select **New**.
3. On the Create New Custom Deduplication form, fill in the fields.

Deduplication rule fields

Field	Description
Product	The product name to which this rule applies. The rule only matches installations of the selected product.
Active	The option that indicates whether the deduplication rule is active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Version Level	The version-matching levels that control how strictly the system compares version numbers when identifying duplicates: ○ **Major version**: Installs with matching major versions are considered duplicates regardless of minor version differences. For example, versions 19.1 and 19.2 of the same product on the same device are treated as duplicates. Installs with unparseable version strings are skipped and not deduplicated at this level. ○ **Exact version**: Installs are considered duplicates only if their normalized version and normalized edition match exactly. This is the most conservative level. Use for products where minor version differences represent distinct deployments that must be tracked separately for compliance. ○ **Any**: Only one install per product and edition combination is kept per device, regardless of version. This is the most aggressive level. Use for products where any version on a device counts as a single installation for compliance purposes.
Stale Record Threshold (Days)	Number of days after which an unrefreshed record is considered stale.

4. Select **Save**.

Result

- The deduplication rule record starts showing in the Deduplication rules list.
- The deduplication rule record is stored in the Custom Deduplication Rules [sam_sw_dedup_rule] table.

Related topics

Software install deduplication

Create a software removal candidate in workspace

Removal candidates reclaim software resources in your environment. They are created automatically from reclamation rules or can be created manually.

Before you begin

Role required: sam_admin or sam_user

About this task

Software reclamation is integrated with Workflow and Client Software Distribution to automate the process of uninstalling software from devices and reclaiming software rights. However, you can also create a removal candidate manually. The following steps are for manually creating a removal candidate.

Starting from the Brazil release, the reclamation workflow can also be completed using the Software Reclamation Flow in the Flow Designer application with additional error handling functionality.

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace** > **License operations** > **Reclamation** > **Removal candidates**.
2. Select **New** to open the Create New Removal Candidate page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the Removal Candidate form, fill in the fields.

Removal candidate fields

Field	Description
Number	Unique removal candidate number that is automatically generated.
Assignment group	Automatically set to the software managers group authorized to respond to removal candidates.
Assigned to	Person primarily responsible for working on this task.
Name	Removal candidate name that is automatically generated. Contains the software installation display name. **Note:** If you're using the bulk reclamation functionality, for the name to be generated, at least one software installation must be selected in the removal candidate form. If no software installation is selected, a name isn't generated and the **Name** field is empty. If you add software installations and later decide to remove all of them, the **Name** field returns to being empty.
Description	Description of why the task exists and what the user must do if they receive an approval.
State	Current state of the removal candidate. ○ Attention Required ○ Ready ○ Awaiting User ○ Awaiting Approval ○ Awaiting Revocation ○ Closed Complete ○ Closed Skipped ○ Closed Canceled
Opened	Date the task was opened.
Closed	Date the task was closed.
Justification	Justification for becoming a removal candidate. ○ Low Usage (default) ○ Unallocated

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Unlicensed ○ Restricted Software
Applies to	Item type to which the reclamation rule applies. ○ Installed Software ○ Subscription Software ○ Engineering App License
Software installation	The software installation being reclaimed.
Engineering App License **Note:** Only appears if **Engineering App License** is selected in the **Applies to** list.	The Engineering application license that you want to reclaim.
User	Name of the user assigned to the software installation. This value can be changed so that another user receives the notification of software being uninstalled. If the **Bulk Reclamation** check box is selected, this becomes a mandatory field.
User subscription	The user to whom this subscription is allocated.
Inactive days	The number of days for which a user's subscription has been inactive. This field is visible only when the value in the **Justification** field is **Low Usage** and the **User subscription** field is not empty.
Bulk Reclamation	Select this check box to reclaim multiple software installations. Once you select this check box, the **Software installation** field is no longer visible. To add software installations, refer to the sub steps mentioned in Step 6.
Configuration item	The device on which the software is installed.
Reclamation rule	The reclamation rule that created the removal candidate.
Rights to reclaim	The number of rights that you want to reclaim. For example, you have 100 rights installed on a license server but you want to reclaim only 40 rights.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Note: Only shown if **Engineering App License** is selected in the **Applies to** list.	
Potential savings	Estimated cost of savings if all removal candidates are in the Closed Complete state. This means the software was uninstalled and the rights were harvested (unused rights * average price per right from entitlements).
Notify user	Check box for notifying the user assigned to the hardware on which the software is installed, requesting permission via email to remove the software.
Configuration item	The device on which the software is installed.
Activity	
Work notes	Used to track the actions that have been performed on this task.

4. Select **Save**.
   The removal candidate record is created. If you selected the **Bulk Reclamation** check box, the state of the removal candidate changes to **Attention Required**. Perform the following sub steps to add software installations before proceeding to the next step. If you didn't select the **Bulk Reclamation** check box, proceed to the next step.

   a. Select **New** in the Software Installation related list.

   b. Select a software installation and select **Save**.
      The software installation you added appears in the Software Installations related list. The state of the removal candidate moves from **Attention Required** to **Ready** and a name is generated in the **Name** field. Continue to select **New** to add more software installations. If you decide to remove all software installations, then the state reverts back to **Attention Required** and the name no longer appears in the **Name** field. For the name to be generated and for the removal candidate to be in **Ready** state, at least one software installation must be selected in the removal candidate form.

5. Select **Reclaim**.

   Once your software installation is reclaimed and removed from your system, the Software Installation column becomes empty. You can refer to the following fields on the Software installation related list to give you insights into the history of the reclaimed software installation.

   - Display name
   - Product
   - Publisher
   - Software model

   You may select any action button on the form to further configure the removal candidate. Action buttons are dependent on the removal candidate's justification and state.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action buttons

Action	Description
Update	Update the removal candidate.
Resume Reclaim	Verify the completeness of data for processing. This button is displayed when the state of the reclamation candidate is **Error**.
Close Complete	Reclaim rights and close the removal candidate.
Close Skipped	Close the removal candidate without reclaiming rights.
Delete	Delete removal candidate.

Reclaim software

Optimize your environment by reclaiming or removing installed software that is not being used or used infrequently.

Before you begin

Role required: sam_admin

About this task

Reclaiming software involves a workflow to remove software for a user. You can reclaim software for multiple reasons such as low usage, optimization generated due to consolidation, or overlapping subscriptions. The reclamation process can be managed manually through the creation of tasks or automatically using the Client Software Distribution (CSD 2.0) capabilities.

You can select **Show Workflow** at any point of time in the reclamation workflow to see the current stage the workflow is in. For information on CSD 2.0, see Client Software Distribution 2.0 application.

Starting from the Brazil release, the reclamation workflow can also be completed using the Software Reclamation Flow in the Flow Designer application along with additional error handling functionality.

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace** > **License operations** > **Reclamation** > **Removal candidates**.
2. Select to open a removal candidate record.
   Verify that the **Assigned to** field has a value. If not, select a value. Typically, the sam_admin role takes ownership of the workflow and ensures that a group is mentioned in the **Assignment group** field. Having a group specified in the **Assignment group** field ensures that the approval goes to the correct group. The assignment group consists of users who can approve or reject a request to keep the software.
3. Select **Reclaim**

   The state of the removal candidate record changes from **Ready** to **Awaiting User**. An email notification is sent to the user to whom the software license is assigned. The user details are mentioned under the removal candidate section.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

An email notification is sent if the **Notify user** check box is selected in the reclamation rule record. If you don't select the **Notify user** check box, the task and email isn't sent to the user.

If the user is an ITIL user, then both email and the approval task will be created for the user. However, if the user is not an ITIL user then only an email is sent to the user.

The email mentions that the software is going to be reclaimed since it's not being used and provides the user with following two options:

- **Yes**: indicates keeping the software.
- **No**: indicates removing the software.

4. Select **Yes** or **No**.

If the user selects **Yes**, the following steps take place:

a. A task gets created for the removal candidate record.

b. The state of the removal candidate record changes to **Awaiting Approval** as a member of the assignment group needs to approve the request for keeping the software.

c. A member of the assignment group approves or rejects the request.

- If approved, the request in the email, the removal candidate record automatically moves to the **Close Skipped** state.
- If the request is rejected, then the state of the removal candidate record changes to **Awaiting Revocation** which is handled by the sam admin role.

  Note:

  In case CSD 2.0 is not installed then the sam admin can assign the request to an individual who can manually uninstall the software. If CSD 2.0 is installed then the software is automatically removed. For more details, refer to the CSD 2.0 documentation.

  If you have optimizations generated for Microsoft 365 products for low usage, consolidate, or overlapping subscription then you can automatically remove the subscriptions from the Microsoft 365 portal.

  If you have integrations or API support reclamations, users will be removed automatically from the portal.

- If the installations or subscriptions are manually removed, then the sam admin role must manually mark the workflow as **Close Complete**. However if the process happens automatically then the system automatically updates the workflow record as **Close Complete**.

If the user selects **No**, the following steps take place:

a. The state of the removal candidate record changes to **Awaiting Revocation**.

b. Based on the scenarios mentioned in the earlier note, software removal takes place.

Note: For removal candidates that are grouped into low usage or overlapping justifications, you must not manually remove subscriptions as auto reclamation is performed for these two justifications. Fore more information on justifications, see Software installation optimization and removal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a catalog request to reclaim assets

Create a catalog request to efficiently reclaim software assets when an employee leaves an organization or moves to a different role.

Before you begin

Role required: sam_admin or sam_user

Procedure

1. Navigate to **Service Catalog**.
2. In the Service Catalog page, enter `Reclaim asset` in the **Search catalog** field on the right-hand side of the page.
3. Select **Reclaim Asset**.
4. On the form, fill in the fields.

Reclaim Asset form

Fields	Description
Requested by	The role of the person, such as HR, manager, or employee, who creates this catalog request.
Requested for	Name of the person for who you are submitting the catalog request.
Employee separation	Whether the person for who you are submitting the asset reclamation is leaving the organization or moving to a different role.
Asset	Assets assigned to the person for who you are submitting the asset reclamation.
Reclaim date	The date by which you want the asset reclaimed by. You can enter today's date or a date in the future.
Reclaim method	The method you intend to use to collect the assets from the departing employee. You can pick up the assets, the employee can drop them off, or ship them to the organization.
Legal hold method	If the assets need to be kept on hold because of any legal reasons.
Notes/Special instructions	Any instructions that you may want to mention.

5. Select **Submit**.
   The asset reclamation request is created. Once the request is created, the sam_user needs to close all the tasks mentioned in the request. For more details, see Close an asset reclamation request.

Close an asset reclamation request

Close an asset reclamation request to efficiently reclaim software assets when an employee leaves an organization or moves to a different role.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: sam_user or asset.

Procedure

1. Navigate to **Inventory** > **Asset Reclamation** > **Asset Reclamation Requests**.
2. Open the request that you want to fulfill.

   In the Software Asset Reclamation Lines related list, a device reclamation line item is created for each device that is returned, has a corresponding CI record, has software installations on it, and that device was selected in the Reclaim Asset form. For example, if five computers were assigned to an employee, then for each computer a separate device reclamation line item is created.

   An extra user reclamation line item is created if the **Employee Separation** check box was selected in the Reclaim Asset form.

3. Click the device reclamation line item.
   The Software Asset Reclamation Line page opens, where a software asset reclamation task titled **Receive, evaluate and update asset** is created.
4. Click the **Receive, evaluate, and update** task.
   The Software Asset Reclamation Task page opens. You now need to manually receive the asset, evaluate if the asset can be redeployed or reused, and then update the asset.
5. Select values for the **Assignment group** and **Assigned to** fields.
6. Click **Close Task** once you have completed all the tasks.

   The line item state now changes to **Closed Complete**

   For each software asset reclamation line item where the type is device reclamation, perform steps 3 to 6.

   Note: Once you receive the asset from the employee, navigate to the Asset page and change the values for the **State** and **Assigned to** fields. Since the asset is no longer assigned to a user, ensure that the **Assigned to** field is empty and the **State** field is not in the **In use** status.

   If the asset that was updated has device allocations, then a software asset reclamation line task titled **Remove device license allocations** is created. All the device allocations records on that Asset (CI) are removed, and the task is marked as **Closed complete**.

   If the asset that was updated has software install records, then a software asset reclamation line task titled **Remove software installs** is created. All the software install records on that Asset (CI) are removed, and the task is marked as **Closed complete**.

   Once all the device reclamation tasks are complete and if a user reclamation line item is not created, then the status of the catalog request changes to **Complete**. However, if a user reclamation task is created, then you need to take care of the following steps to complete and close the user reclamation line item.

   Note: A user reclamation task is created if the **Employee Separation** check box was selected in the Reclaim Asset form.

   A user reclamation workflow is initiated once the reclaimed date mentioned in the Asset Reclamation Request form has lapsed. A user license allocation task titled **Revoke user license allocations** is automatically created to remove all user license allocations. A few manual tasks are also created that need to be completed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. Complete the following manual user reclamation tasks:
   - Revoke SSO access (if the employee had any SSO provider plugin enabled)
   - Revoke Citrix access (if the employee had the Citrix plugin enabled)
   - Revoke SAP access (if SAP publisher pack plugin was enabled)
   - Revoke user subscriptions. Open the task and ensure that removal candidate records are created for each user subscription record.
8. Once all the user reclamation tasks are closed, the status of the catalog request changes to **complete**.

Create and manage reports in workspace

Create and manage your report tiles in the Software Asset Workspace.

Before you begin

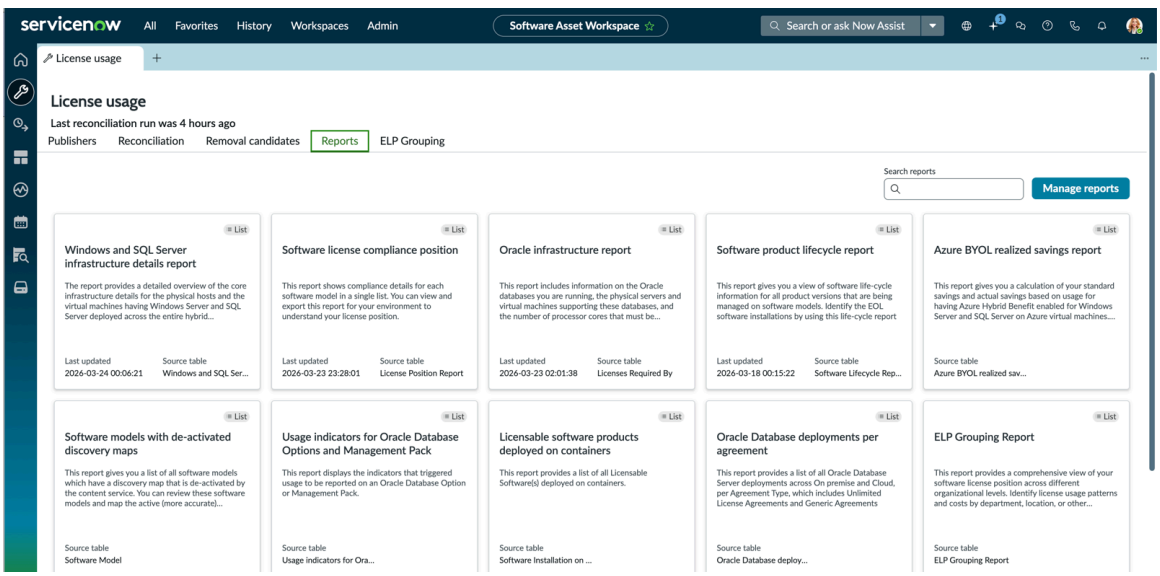
Role required: sam_admin

About this task

All the base system Software Asset Management reports and the custom created reports are stored in the SAM Workbench Report [samp_workbench_report] table. List reports are supported by default. For creating other types of reports, you need to create a UIB page in the Software Asset Workspace with the necessary data visualization. A parameter called *`reportSysId`* needs to be passed to the UIB page. You can use the UIB page's route in the report tile creation form after it has been built.

Procedure

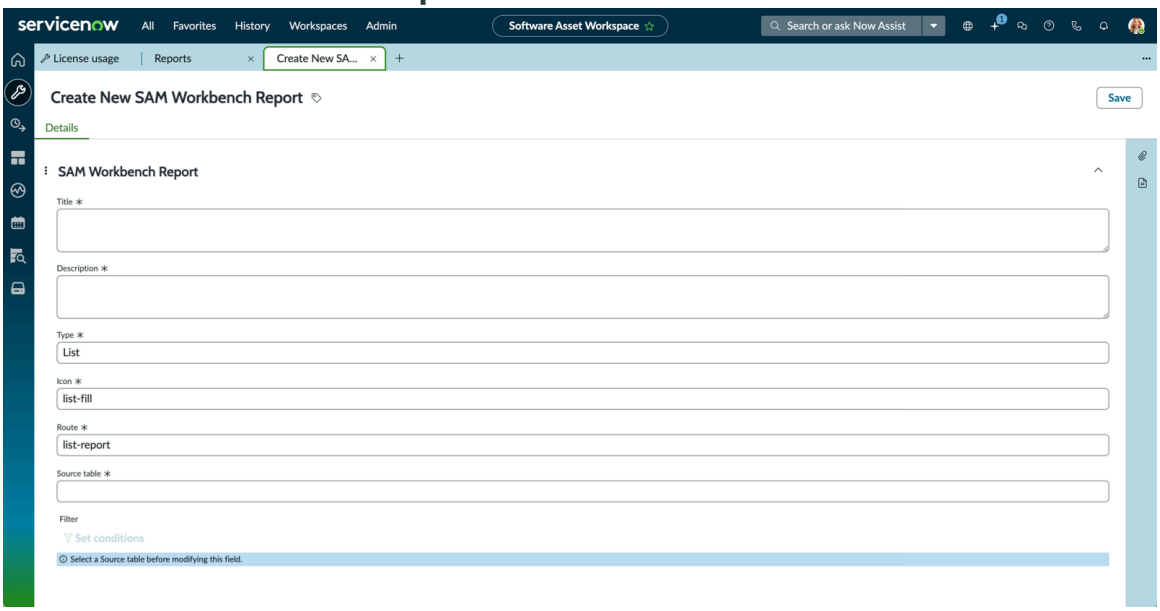
1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License usage**.
2. In the License usage view, select the **Reports** tab.



3. Select **Manage Reports**.
4. In the Reports list view page, select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New SAM Workbench Report form



5. On the form, fill in the fields.

Field	Description
Title	The title of the report tile.
Description	A brief description of the report tile.
Type	The type of the report. For example, list, bar, pie chart. The default value is List.
Icon	The unique icon identifier from the Now Design System icon library. Examples include chart-bar-group-fill, chart-pie-fill. The default value is list-fill.
Route	This the path taken by a report when it is clicked. This takes you to the list view of the source table with the specified filter conditions. This can be routed to any other page within the Software Asset Management application provided that the page accepts the *reportSysId* parameter. The default value is list-report.
Source table	The table on which the report is based.
Filter (Set conditions)	The filter to be used on the list report.

6. Select **Save**.
   The new report tile appears on the Reports tab. You may need to reload the Reports tab to see the new report tile.

View your cluster setup in 360 degrees

Get a 360-degree perspective of your cluster setup to manage license consumption across the cluster.

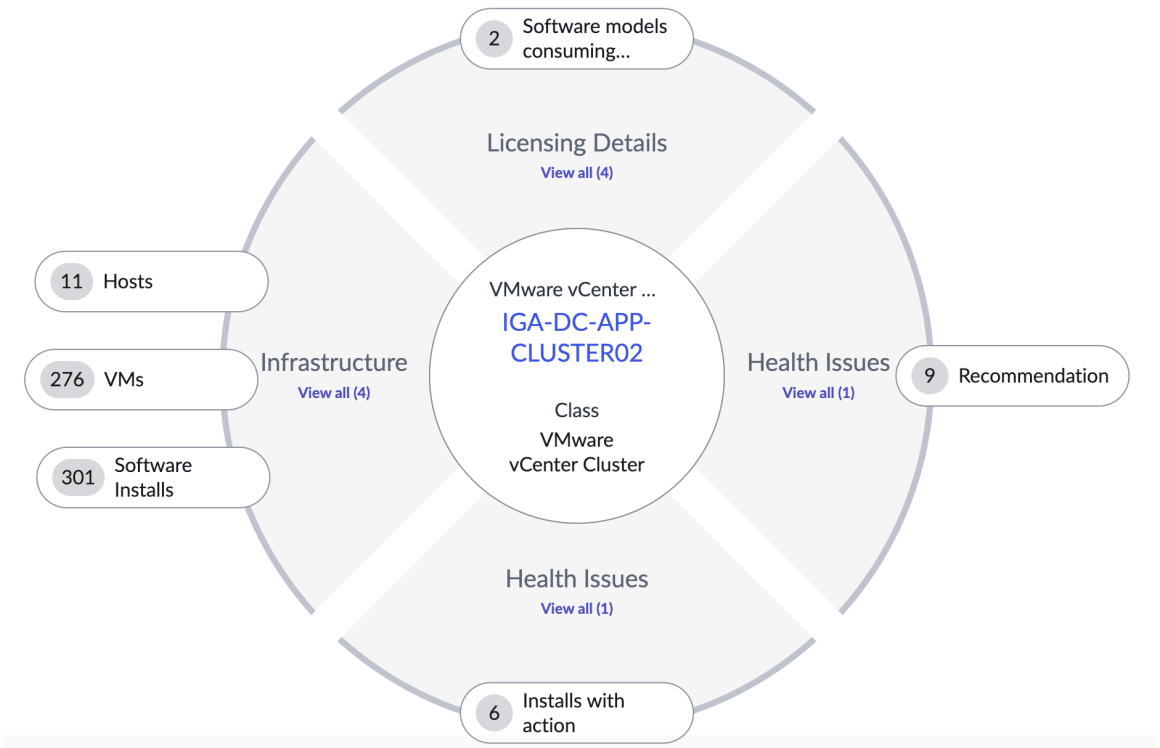
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: sam_admin

Procedure

1. Navigate to **Software Asset Workspace** > **License usage**.
2. Select a publisher card to open the publisher details page.
3. From the Publisher details page, select a software model from the navigation tree on the left hand side.
4. From the **License Metrics Results** tab, select the value on the **Licenses required** column.
5. In the Licenses Required By page, select a cluster from the **Cluster** column.
   The cluster record page opens.
6. Select **SAM Cluster 360°**.
   The cluster setup appears.



7. View the following details on the cluster.

   - Infrastructure: View entities such as hosts, virtual machines (VMs), host affinity rules, and software installations in the cluster. Select an entity to view the complete list. For example, select **Software Installs** to view all software installations. You can group the software installations by normalized publisher, normalized product, or by software model results. You can also select any software installation from the list such as SQL Server to view all SQL Server software installations in that cluster.
   - Licensing details: View the software models consuming licenses, allocations, device license consumption analysis, and ignored installations on the cluster. Select an entity to view the complete list.
   - Health issues: View all health issues across products in the cluster. Additionally, view installations that require your attention to be considered for reconciliation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The 360-degree view lets you drill down from the top view of an entity to the lowest level. This view helps you to better understand license composition and remediation actions across the cluster. As an example, you can select a software model to drill down to view its metric attributes, override license costs, downgrade rights, software entitlements, and software model results. You can further select any of these entities, such as software model results, to get to its lowest denominator.

8. Select **Open Dependency View** to view the relationship between the nodes of the cluster. For details on Dependency Views, see Dependency Views map menus and controls.

View calculations for your licenses in workspace

Evaluate the license compliance of software applications by viewing the details for all required licenses through the Software Asset Workspace License usage view.

Before you begin

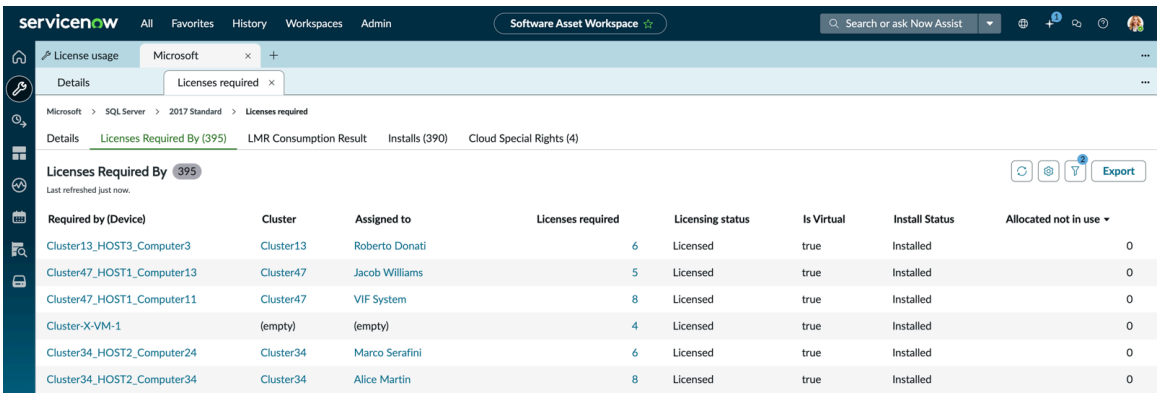
Role required: sam_admin and sam_user

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License usage**.
2. View the summary of a software model by selecting a publisher from the left pane.
3. View the number of licenses purchased and required by selecting the **License Metric Results** tab.

   For more information about the fields in the License Metric Results tab, see the License metric results table in License usage publisher fields in workspace.

4. View the details about the required licenses by selecting a value for a configuration item under the **License required** column.



Licenses Required by

Field	Description
Required by (Device)	Name of the configuration item such as server, cluster, which consumes the licenses. The **Required by (Device)** field is replaced by the **Required by (SAP Cloud use type)** field when the publisher selected is SAP and the product is SAP S/4HANA.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

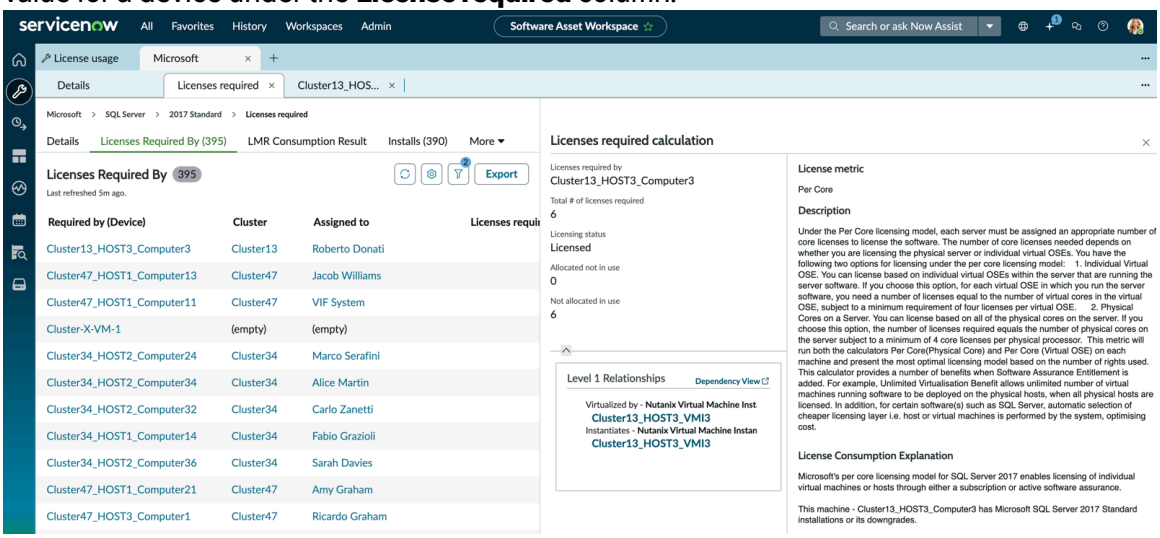
Field	Description
Cluster	○ If the configuration item is part of any cluster, the cluster name displays. ○ If the configuration item is not part of any cluster, the value is empty.
Assigned to	Name of the user assigned to that particular configuration item.
Licenses required	Sum of rights that the configuration item (allocated, not allocated, and installed) uses.
Licensing status	Indicates whether the configuration item is licensed or not licensed.
Is Virtual	Indicates whether the configuration item is a virtual or physical host.

5. View all the downgrades being used by the license.
   This related list only appears if the specified license is used by a downgrade version of the software. If a downgrade is not using any rights, that downgrade doesn't appear in this related list.

Downgrades

Field	Description
Software model	Name of the software model.
Rights used	Number of rights used by the license.
Install count	The number of installations being used for the software model for the specified license.

6. In the Licenses Required By related list, view the details of required licenses by selecting the value for a device under the **License required** column.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

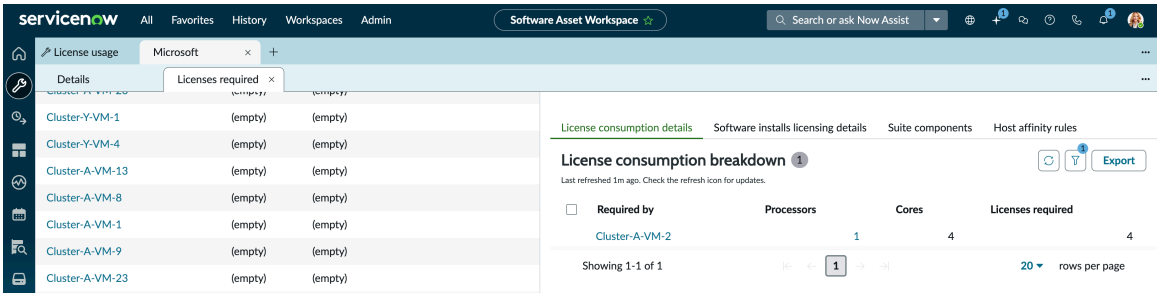
Licenses required calculation

Field	Description
Licenses required by	The cluster for which the calculations are shown.
Total # of licenses required	The total number of licenses consumed or required.
Licensing status	Shows the status of licenses. **Licensed** implies that all rights were used. **Not Licensed** implies that rights are required.
Allocated not in use	Rights allocated on the cluster but are unused to license any installations. The value 0 implies that there are no allocations on the cluster. **Note:** **Allocated not in use** are the rights that are wasted because the user or device for which these rights have been allocated does not have the software installed.
Not allocated in use	Number of rights for license installations, but not allocated.
Level 1 Relationships	Relationship of hosts to the current configuration item. **Note:** Appears only for server-based calculators.
Dependency View	Graphically displays an infrastructure view for a configuration item.
License Metric	Detailed explanation of the license metric.
License Consumption Explanation	A detailed license consumption summary post reconciliation. The summary gives you a thorough understanding of how your license rights are used, the methodology behind license calculations, and the reasoning for the consumption process.

7. View the infrastructure of a configuration item and the metric attributes applied by selecting the **License consumption breakdown** tab.

   For more information on the license calculation for CrowdStrike products, see License usage breakdown for CrowdStrike products.

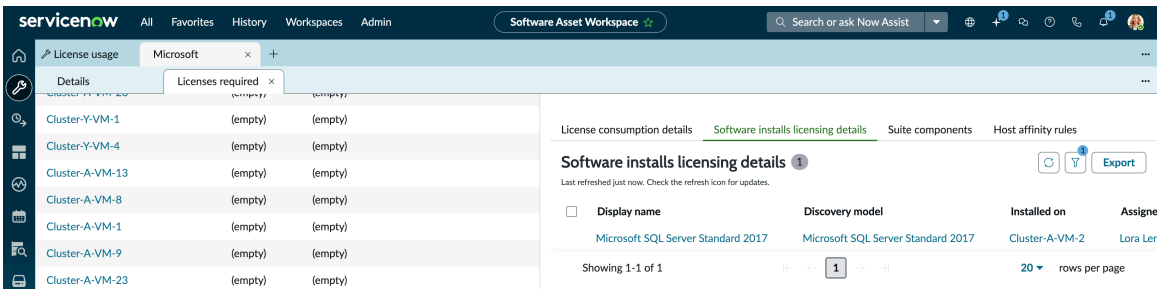
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



License consumption breakdown

Fields	Description
Required by	Name of the configuration item that consumes the rights.
Processors	Number of processors on this configuration item.
Cores	Numbers of cores in this processor.
Licensable cores	Number of core licenses required to license this configuration item.
Licenses required	Number of licenses required to license this configuration item.
Metric attributes applied	Software products from publishers such as Microsoft require a minimum number of licenses to be assigned. For example, Microsoft SQL Server requires a minimum of 4 core licenses for each processor on a server. Metric attributes auto-assign these licenses.

8. View the details of the installations covered by licensing related to the configuration item by selecting **Software installs licensing details**.



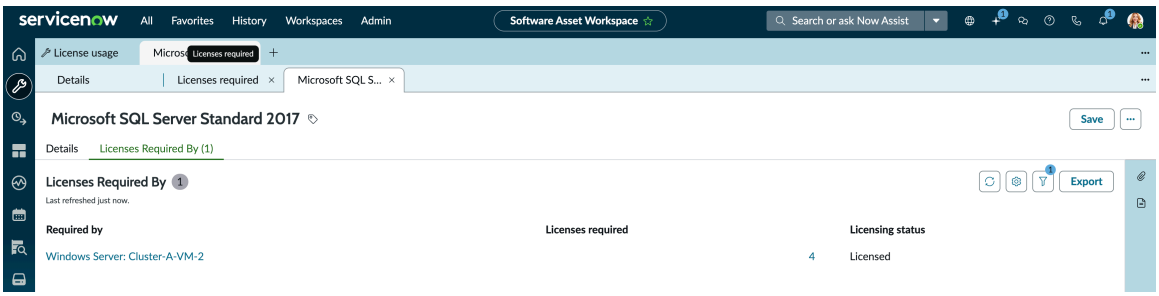
Software installs licensing details

Field	Description
Normalized display name	The normalized display name of a software product.
Discovery model	Normalizes the software you own by analyzing and classifying models to reduce duplication.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Installed on	Configuration item on which the software is installed.
Assigned to	Name of the user assigned to this configuration item.
Unlicensed install	Indicates whether the install is licensed or unlicensed.

a. View the licensing status of an install on various hosts within a cluster by selecting a normalized display name for Per Core and Per Core (with CAL) license metrics.



9. Check the accuracy of the license consumption and view the host affinity rules configured for a cluster by selecting the **Host affinity rules** tab.

Host affinity rules can be configured for SQL Server and Windows Server Standard while determining license consumption. This helps to optimize the number of licenses required and significantly minimizes the number of licenses required resulting in cost savings.

Host affinity rules

Field	Description
Name	Name of the rule configured for the cluster.
Active	Indicates whether the configured rule is active or inactive.
Cluster	Name of the cluster where the host affinity rule is configured.
VM Group	Name of the group of virtual machines.
Host Group	Name of the group of hosts.
Mandatory	Indicates whether the configured rule is required.
Affinity	Indicates whether the virtual machines live on a host group.

10. View the suite components for the software model.
This tab appears only if the software model is a suite.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Suite components

Field	Description
Suite parent	The parent suites to which the software is assigned. For example, the parent suite for several common Microsoft products is a version of Microsoft Office.
Suite child	The child product or products of the suite.For example, For example, Microsoft Word and Microsoft Excel are child products of Microsoft Office.
Mandatory	Requirement of a suite component. A suite component can be Optional, Always Mandatory, or Mandatory Group.

Create group allocations

Create group allocations to allocate licenses to all the members of the assignment group.

Before you begin

Role required: sam_admin or sam_user

About this task

The SAM Manager can add a group allocation record for a software model with valid software entitlement records to create a user allocation for the group members.

Note: Licenses are allocated to the group members based on the number of unallocated licenses available for the software entitlement.

Procedure

1. Navigate to **Software Asset Workspace** > **License operations** > **Software model**.
2. Select **Group Allocations**.
3. Select **New**.
4. On the Create New Group Allocations form, fill in the fields.
   For a description of the field values, see Group allocations fields.
5. Select **Save**.

Result

- User allocation records are created for the members of the assignment group and listed in the **User Allocations** tab.
- The group allocation record is saved in the Group Allocations [alm_entitlement_group] table.

What to do next

View the user allocations list by navigating to any of the following paths:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Navigate to the **User Allocations** within the group allocation record.
- Navigate to **Software Asset Workspace** > **License operations** > **Licensing** > **Software models** and select a software model record. Select the **User Allocations** tab.
- Navigate to **Software Asset Workspace** > **License operations** > **Licensing** > **Software models** and select a software model record. Select the **Software Entitlements** tab and select a software entitlement record. Select the **User Allocations** tab.

Related topics

Allocating licenses to a user group

Group allocations fields

Create device allocation

Create a device allocation for a software entitlement to specify devices that have been granted rights.

Before you begin

Role required: sam_admin or sam_user

Procedure

1. Navigate to **Software Asset Workspace** > **License operations**.
2. Select **Software entitlements**.
3. Select a software entitlements record.
4. Select the **Device Allocations** tab.
5. Select **New**.
6. On the form, fill in the fields.

Create New Device Allocations form

Display name	Display name for device allocation. This field value is automatically set based on the selected **Allocated to** and **Entitlement** field value. This field value appears only when the allocation record is saved.
Allocated to	The device to which the license is allocated.
Entitlement	Automatically set to the selected software entitlement.
Quantity	Quantity of licenses allocated to this device. Default is 1.
License key	License key of the software.

7. Click **Save**.

Result

- Device allocation record is created for the device and listed in the **Device Allocations** tab.
- The device allocation record is saved in the Device Allocations [alm_entitlement_asset] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Copy user or device allocations

Create entitlements in workspace

Allocation management on Software Asset Management

Copy user or device allocations

Copy user or device allocations from one entitlement to the other.

Before you begin

Copy allocations from a source entitlement to a target entitlement to renew expired entitlements or add a new maintenance. Additionally you can also copy allocations while creating entitlements that require the same allocations as in another entitlement.

The entitlement from which you want to copy the allocations is referred to as the source entitlement. The entitlement to which you want to copy the allocations is referred to as the target entitlement.

User allocations can be copied to only entitlements that support user allocations. Similarly, device allocations can be copied to entitlements that support device allocations. For details on license metrics, see Software license metrics.

If the selected user or device is already allocated in the target entitlement, the quantity of that allocation is incremented.

Prior to copying allocations, ensure that the following prerequisites are met:

- The target entitlement has enough allocations available. The **Copy allocations** button only appears when the allocations available on the entitlement is greater than zero. An error occurs if the number of allocations being copied exceeds the number of available allocations in the target entitlement
- The target entitlement is in **Build**, **In use**, or **On order** state.
- The target entitlement has enough available rights.

Role required: sam_admin or sam_user.

Procedure

1. Navigate to **Software Asset Workspace** > **License operations** > **Software entitlements**.
2. Open the target entitlement in which you want to copy the user or device allocations.
3. Select the appropriate allocations related list (User Allocations or Device Allocations).
4. Select **Copy allocations**.
   The details of the target entitlement such as allocations available, license type, active rights appear at the top of the page.
5. Select the entitlement from which you want to copy the allocations from in the **Source entitlement** list.
   All the details of the source entitlement such as license metric, metric group appear on the Details page.
6. Select the Source allocations related list and select the allocations.
7. Select **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If the copy allocation process is successful, then **Submit** gets disabled. A message informs you that the copy of allocations is being processed. You can check the status by clicking the link in the message.

The link takes you to the Software Asset Job Results [samp_job_log] table. Use the Name column to search for the job log record, titled *Copy Allocations to < >*, where the angle brackets refer to the display name of the target entitlement.

Related topics

Create device allocation

Create consumption rules

Create consumption rules to restrict license consumption to certain entities within your organization.

Before you begin

Role required: sam_user

Procedure

1. Navigate to **Software Asset Workspace** > **License operations** > **Consumption rules**.
2. Select **New**.
   The Create New Consumption Rule page opens.
3. On the form, fill in the fields.

Field	Description
Display name	Name of the consumption rule.
Company	The subsidiary company for which the con sumption rule is created.
Cost center	The cost center within a company for which the consumption rule is created.
Country	The country for which the consumption rule is created.
Department	The department for which the consumption rule is created.
Region	The region for which the consumption rule is created.
Company children	Select to include the children of the compa ny.
Department children	Select to include the children of the depart ment.
Cost center children	Select to include the children of the Cost cen ter.

4. Select **Save**.
   The new consumption rule appears in the Consumption rules list view. You must link this rule to one or many entitlements. For details on how the system evaluates a linked consumption rule, see Consumption rule evaluation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Link consumption rules to entitlements

After you've created a consumption rule, you must link the rule to one or more entitlements.

Before you begin

Consumption rules aren't supported for the following license metrics:

- IBM RVUs
- IBM UVUs
- Workday
- Employee

The Entitlement Consumption Rules related list on the entitlement form doesn't appear for these license metrics.

Role required: sam_user

Procedure

1. Navigate to **Software Asset Workspace** > **License operations**.
2. Open the entitlement to which you want to link the consumption rule.
3. Select the Entitlement Consumption Rules related list.
4. Select **New**.
   The Create New Entitlement Consumption Rule page opens.
5. On the form, fill in the fields.

Field	Description
Software entitlement	The software entitlement to which you're link ing the consumption rule.
Consumption rule	The consumption rule that you want to link this entitlement to.
License pool	License pool associated to the consumption rule. A license pool is a reservation of rights for a group entity defined on a consumption rule.

6. Select **Save**,
   The consumption rule appears in the Entitlement Consumption Rules related list.

What to do next

For details on how the system evaluates a linked consumption rule against software installations, see Consumption rule evaluation.

Create a comprehensive lifecycle report using a guided experience

Use a guided experience to improve your lifecycle data completeness.

Before you begin

Role required: sam_admin or sam_user

About this task

This playbook is divided into four stages:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Getting ready
- Engage content service
- Use built-in tools
- Finalize report

Each stage has one or more than one activity that you need to perform. Activities are typically performed sequentially. You can go back to those activities to complete them later.

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace** > **Software asset analytics**.
2. Select the **Lifecycle management** tab.
3. Select **Add lifecycle data** to open the *Add data with playbook* dialog box.
4. Select one or more publishers and products in the **Publishers** and **Products** fields.
   You can also select the **All publishers** and **All products** check boxes to include all the publishers and products.
5. Select a product type for the lifecycle data in the **Product type** section.
6. Select a user to manage this playbook in the **Assigned to** field.
   The playbook can be assigned to only users with the sam_admin or the sam_user role.
7. Enter a name for the playbook in the **Display name** field.
8. Select **Start playbook**.

   The playbook opens in the Getting ready stage. Its current state is **In Progress**.

   The playbook displays the publishers and products that you selected. Additionally. the target completeness is also mentioned, which by default is 95%.

9. Select **Mark Complete** to go to the next page.
   The Create a success goal page opens. Associating a success goal to your playbook helps you to track your work and contribute towards a complete lifecycle report.
10. On the form, fill in the fields.
    For a description of each field, see SAM Success Goal Details.
11. Select **Save** to move to the next page.
    The Review report page opens listing all the lifecycle records for the particular publisher and product that you selected.
12. Select **Mark Complete** to go to the next page.
    All the tasks in the Getting ready lane are complete and you move to the Introduction page in the Engage content service stage.
13. Select **Mark Complete** to go to the next page.
    The Create success activity page opens. Create a success activity to associate it with the success goal you earlier created.
14. On the form, fill in the fields.

    For a description of each field, see SAM Success Activity.

    If your role or any other role that has permission to submit content requests, can create and submit a content request.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select the support portal link to open the Asset Management Content Request page in a new tab.

b. On the form, fill in the fields.

c. Select **Submit** to submit the content request and return to the Create success activity page.

15. Select **Submit** in the Create success activity page.
The Follow up on task page opens.

16. Select **Mark Complete** to go to the next page.
All the tasks in the Engage content service stage are complete and you move to the Introduction page in the Use built-in tools stage.

17. Select **Mark Complete** to go to the next page.
The Input custom lifecycle dates page opens that lists lifecycle reports that don't have end-of-life, end of support, or end of extended support dates.

18. Select dates in the **Phase start dates** column.
The dates you enter are automatically pushed into the Custom Software Product Lifecycle [sam_custom_sw_product_lifecycle] table.

19. Select **Mark Complete** to go to the next page.
The Input custom GA dates page opens that lists lifecycle reports that don't have GA dates.

20. Select dates in the **Phase start dates** column.
The dates you enter are automatically pushed into the Custom Software Product Lifecycle [sam_custom_sw_product_lifecycle] table.

21. Select **Mark Complete** to go to the next page.

    The Create lifecycle averages success activities page opens.

    The sam_user role doesn't have permissions to create lifecycle averages. Create success activities instead and assign them to sam_admin or other authorized users to create the lifecycle averages records.

    Users with the sam_admin role have two options. They can create a success activity task and assign it to themselves for immediate completion, or they can assign the task to subject matter experts, such as Product Owners, who can provide guidance on the appropriate values and parameters. While sam_admins have the technical permissions to create lifecycle average records, they may not have the domain expertise to determine the correct values for specific products.

22. Select **New** in the Create lifecycle averages success activities page.

23. On the form, fill in the fields.
For a description of each field, see SAM Success Activity

24. Select **Submit** and then select **Mark Complete** to move to the Input lifecycle averages page.

    If you select **Mark Complete** before selecting **Submit**, you will be taken to the next page without submission of this task.

    You can review the existing lifecycle averages and update the values if needed or you can create a lifecycle averages record.

25. Select **New** to create a lifecycle averages record.

26. On the form, fill in the fields.
For details, see Create averages for product life cycles in workspace.

27. Select **Submit** and then select **Mark Complete**.

28. Select **New** in the Create parent child definitions page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create parent-child definitions to enable lifecycle date propagation across related software.

29. On the form, fill in the fields.
30. Select **Submit** then select **Mark Complete** to move to the Run report page.
    All the tasks in the Use built-in tools stage are complete and you move to the Run report page in the Finalize report stage.
31. Select **Mark Complete** to automatically initiate the *SAM - Create Calculated Software Lifecycles* job.

    After the job has successfully completed, the calculated lifecycles are created.

    If the job encounters errors, a troubleshooting message appears indicating that you need to execute the scheduled job manually from outside the playbook environment.
32. Select **Mark Complete** in the Calculated lifecycle job success page to automatically initiate the *SAM - Generate Data For Software Lifecycle Report* job.

    If the job encounters errors, a troubleshooting message appears indicating that you need to execute the scheduled job manually from outside the playbook environment.
33. Select **Mark Complete** once the job has successfully completed.
    The Review report page opens which shows the completeness score.
34. Select **Mark Complete**.
    This completes the playbook and you can exit the playbook.

View discovered engineering licenses in workspace

View a list of all the discovered and normalized software for your engineering applications in the Software Asset Workspace.

Before you begin

Role required: sam_admin or sam_user

You can view a list of all the normalized publishers and products for your engineering applications. Additional information such as the version, quantity of licenses, and the type of license is also displayed.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations**.
2. Select **Discovered engineering license** from the Discovery list view.
3. You can click a record to view additional details.
   This takes you to the Company page in the classic view.

View engineering license servers in workspace

View the list of license management servers that OpenLM or Open iT connect with to get data into your ServiceNow instance in the Software Asset Workspace.

Before you begin

Information such as the name and type of the server, its current status, whether it's currently active, and the last connection time is displayed.

Note: Engineering license servers only appear if the Software Asset Management Professional for Engineering Applications (com.sn_samp_eng_app) plugin is activated.

Role required: sam_admin or sam_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations** > **Engineering license server**.
2. Select a license server record to view its details.

Add custom software products in workspace

Add a custom software product for any publicly available software product that does not exist in the Software Asset Management Content Library. Custom software products enable you to normalize and account for software products that aren't part of the Software Asset Management Content Library yet.

Before you begin

If you want to enable the Software Asset Management application to submit content requests for your custom software products, opt in to the Software Asset Management Content Service and then enable the Custom Software Products KPI. See Enable sharing information with Software Asset Management content service for detailed instructions.

Role required: sam_admin

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. From the Software Asset Workspace, open the License operations view.
3. From the navigation menu of the License operations view, navigate to **Content** > **Custom software products**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Custom Software Product form

Field	Description
Publisher	Publisher of the custom software product.
Product	Name of the custom software product.
Subscription software	Option to indicate if the custom software product has a subscription.
Product type	Type of software product. Select one of the following options: ○ **Child**: A component of a main software product. This software product type isn't licensable. ○ **Driver**: A software product that controls a device. ○ **Licensable**: A software product that is licensable. ○ **Not Licensable**: A software product that is not licensable. ○ **Patch**: A software product that updates, fixes, or improves an existing computer program. ○ **Unknown**: A software product that is unknown.
Product classification	United Nations Standard Products and Services Code® (UNSPSC®) classification for the custom software product.
Active	Option to indicate if the custom software product is active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Exclude from content service	Option to prevent the custom software product from being shared with the Software Asset Management Content Service.

6. Select **Submit**.

Result

The custom software product is immediately available to use in your downstream processes, such as normalization and reconciliation. Depending on whether you enabled or turned off the **Exclude from content service** option, the Software Asset Management application can either continue using the custom software product or begin using the corresponding software product in the Software Asset Management Content Library.

- If you enabled the **Exclude from content service** option, the Software Asset Management application continues to use the custom software product in your downstream processes.
- If you turned off the **Exclude from content service** option, the Software Asset Management application proceeds as follows:
  1. The Software Asset Management application automatically creates and sends a corresponding content request to the Content Service team.
  2. After the Content Service team reviews and approves the request, the software product is added to the Software Asset Management Content Library.
  3. During the next scheduled content update, the new software product in the Content Library is pushed to your ServiceNow instance and then mapped to the custom software product.
  4. The Software Asset Management application automatically generates a product suggestion that enables you to consolidate the custom software product with the software product in the Content Library. This consolidation updates all references to the custom software product with references to the software product in the Content Library. You can choose to accept or reject the suggestion.
     - If you accept the suggestion, the Software Asset Management application begins using the software product in the Content Library for your downstream processes.
     - If you reject the suggestion, the Software Asset Management application continues to use the custom software product in your downstream processes.

     For more information on product suggestions, see View custom software product suggestions in workspace.

View custom software product suggestions in workspace

View the product suggestions that enable you to consolidate your custom software products with corresponding software products in the Software Asset Management Content Library. By consolidating these software products, you can update all references to your custom software products with references to the software products in the Content Library. You can choose to accept or reject these suggestions.

Before you begin

Role required:

- sam_admin: Accept or reject product suggestions.
- sam_user: View product suggestions.

About this task

You can add custom software products for any publicly available software products that don't exist in the Software Asset Management Content Library. For more information on custom software products, see Add custom software products in workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. From the Software Asset Workspace, open the License operations view.
3. From the navigation menu of the License operations view, navigate to **Content** > **Custom software product suggestions**.
4. View the list of all product suggestions for your custom software products.
   Select a product suggestion record to view more details about the suggestion. You can also choose to accept or reject the suggestion.
   - If you accept the suggestion, all references to the custom software product are updated with references to the corresponding software product in the Software Asset Management Content Library.
   - If you reject the suggestion, all references to the custom software product remain the same.

View license usage for your installations

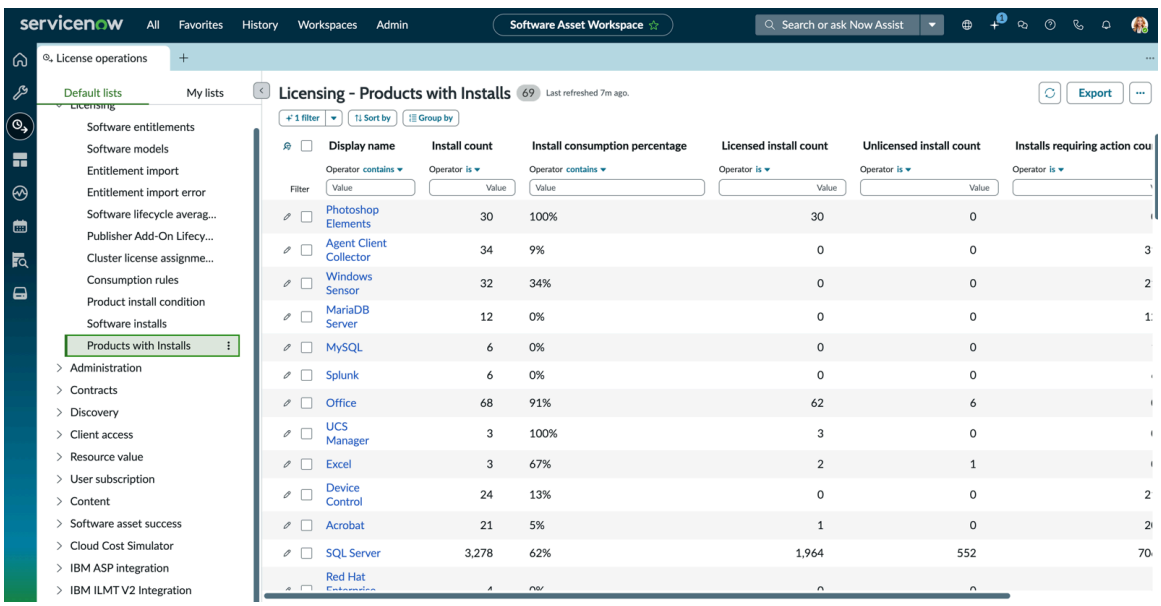
Track your installation to license journey by connecting software installations to the licenses consumed and identifying statuses such as licensed, unlicensed, ignored, or requiring action.

Before you begin

Role required: sam_manager

Procedure

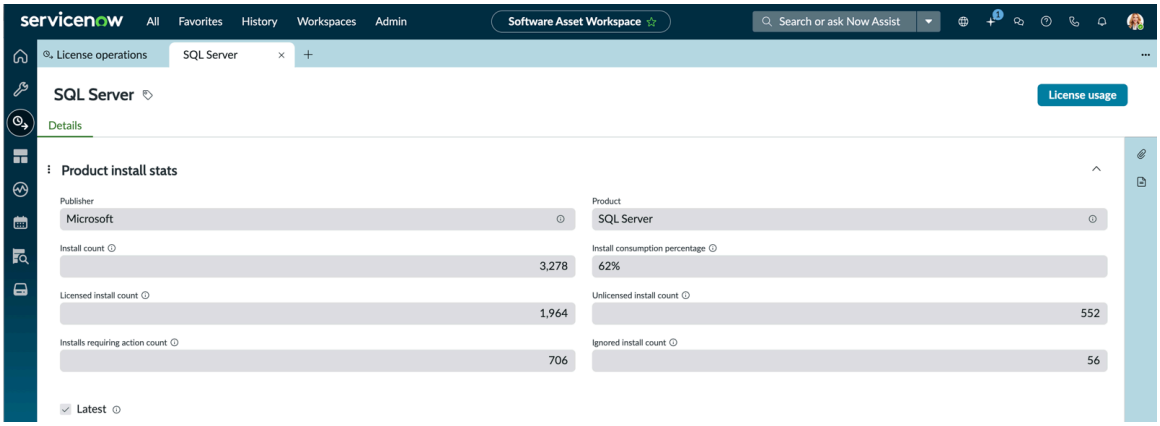
1. Navigate to **Software Asset Workspace** > **License operations** > **Products with installs**.



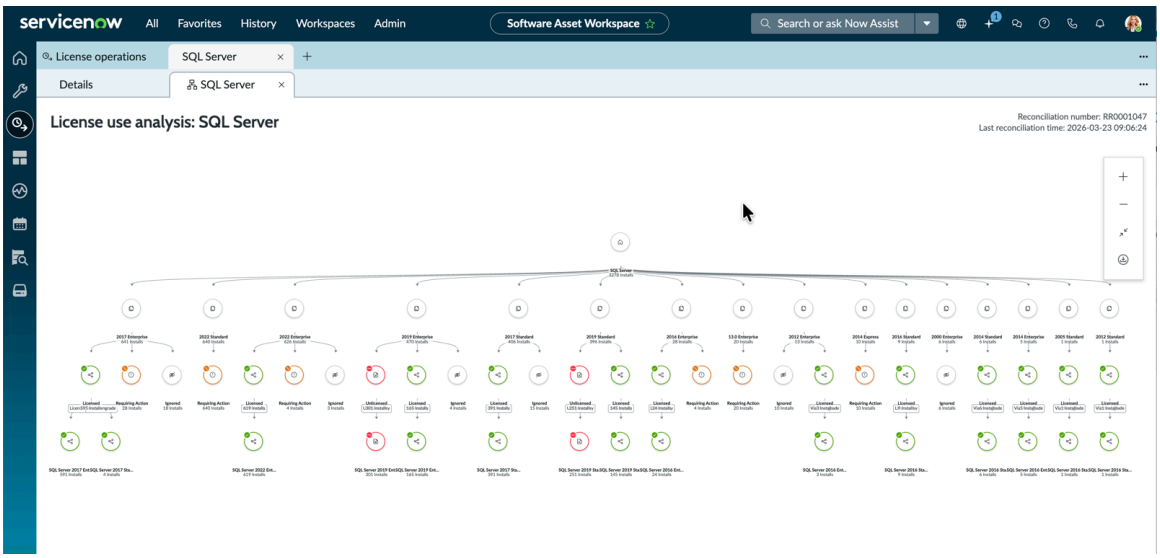
   The preceding page showcases all your products with installations and offers a high-level overview of how these installations are being used and licensed.

2. Select a product to open the Details page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



3. Select **License usage**.



The License use analysis page for the product opens displaying a four-level node map that illustrates how the licenses are being used.

You can also access the License use analysis page from the Publisher details page by selecting **Product install analysis** for a publisher, selecting a product, and then selecting **License usage**.

4. View the four-level node map to understand the license usage for the product.
   - The highest level in the node map represents the product.
   - The second-level features nodes for different product versions and editions, with each version-edition combo having its own node.
   - The third level nodes indicate the licensing status of installations, such as licensed, unlicensed, requiring action, and ignored.
   - The fourth level nodes display the licensing results for installation groups, showing which licenses are in use.

   You can select a node to delve deeper into the software installation lists and examine individual installation records.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The top-right corner of the node map shows the reconciliation number that generated the current node map, along with the timestamp of the last reconciliation run. If reconciliation is executed with domain separation settings enabled, multiple node maps are displayed.

5. **Optional:** Select the Export map icon on the right side of the page to download this node map as an image.

Create averages for product life cycles in workspace

Create averages to calculate software End of Life (EOL) and End of Support (EOS) life cycles in the Software Asset Workspace.

Before you begin

Role required: model_manager

About this task

You can create averages that can be used globally for all products and publishers or you can create averages specific to a product or a publisher. These averages are used to create calculated life cycles for products.

Ensure that *com.snc.samp.generate.calculated.lifecycles* system property is enabled. For additional details, see Product life cycles.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations** > **Software lifecycle averages**.
2. Select **New** to open the Create New Software lifecycle averages page.
3. On the form, fill in the fields.

Field	Description
Type	The type of option you select for creating life cycles. Choose from the following options: ○ **Custom industry average**: Refers to the industry averages based on the General Availability (GA) dates. ○ **Product**: Refers to a specific product. This includes custom products too. ○ **Publisher**: Refers to a specific publisher. This includes custom publishers too.
Display name	A unique name for this life cycle average record.
Product	This field appears only if you select the value **Product** in the **Type** field.
Publisher	This field is automatically populated once you select a product. If you selected the value **Publisher** in the **Type** field, then you select a publisher.
Domain	Indicates the domain in which your instance is located.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Average end of life period (months)	Specify the number of months for the EOL life cycle.
Average end of support period (months)	Specify the number of months for the EOS life cycle.
Active	Indicates that the life cycle average record will be used for creating software life cycles.

4. Select **Save**.
   The record is created and appears in the Software lifecycle averages list view.

Use publisher add-on lifecycles in the Software Lifecycle Report

If you purchase an add-on or optional support for a software product, enable the Software Asset Management application to automatically update the life-cycle dates of that product with the extended life-cycle dates of the add-on or optional support. These updated life-cycle dates are populated in the Software Lifecycle Report [sam_sw_product_lifecycle_report] table.

Before you begin
Role required: sam_admin or sam_user

Procedure
1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. From the Software Asset Workspace, open the License operations view.
3. From the navigation menu of the License operations view, navigate to **Licensing** > **Publisher Add-On Lifecycles**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Publisher Add-On Lifecycles

Field	Description
Active	Option that indicates if the Software Asset Management application can update the life-cycles dates of the specified software product with the extended life-cycles dates of the add-on or optional support that you have purchased.
Domain	Domain in which the life-cycles dates are updated.
Product	Software product that you want to update the life-cycle dates for. **Note:** If you leave this field empty, the Software Asset Management application updates the life-cycle dates of every product with an add-on or optional support under the specified software publisher.
Publisher	Publisher of the software product that you want to update the life-cycle dates for.

6. Select **Save**.

Result
When the next SAM - Generate Software Lifecycle Report scheduled job runs, the Software Asset Management application uses life-cycle information from the Software Product Lifecycle [sam_sw_product_lifecycle] table to automatically update the life-cycle dates of the specified

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

software product with the extended life-cycle dates of the add-on or optional support that you have purchased.

Manually override edition value in workspace

If the edition of a software installation is not automatically discovered, you can specify the edition on the Software Installation form (if known) so the software can be successfully reconciled.

Before you begin

Role required: sam_admin

About this task

For reconciliation to run successfully, the publisher, product, version, and edition fields of the software must be set. When the edition is not discovered automatically (edition value is not included as part of the **Display name** field) but you know the edition, you can manually set it to the correct value (for example `Enterprise`).

Once the edition value is set, the discovery model for the software install is automatically reset. If the appropriate discovery model does not exist, a new one is created.

Note: Not all software products consist of an edition. Of the software products consisting of an edition, not all edition values are automatically discoverable.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations**.
2. Select **Discovery models**.
3. In the Discovery models page, open a discovery model.
4. Select the Software Installations tab and open the software installation record for which you want to set the edition value.

   Note: The **Edition override** field is a free-form field (no lookup list) and since this field is used as a key, the value entered must be exact.

5. Select **Save**.
   The software installation is associated to a different discovery model containing the edition value as part of the primary key. If the appropriate discovery model does not exist, a new one is created.

View normalization suggestions in the Software Asset Workspace

View normalization suggestion records in the Software Asset Workspace that are created for discovery models. You can accept or reject these suggestions.

Before you begin

Role required:

- sam_admin: accepts or rejects the normalization suggestions.
- sam_user: views normalization suggestions.

The normalization suggestion records are stored in the Normalization Suggestions [samp_normalization_suggestions] table.

Procedure

1. Navigate to **All** > **Software asset** > *`Software Asset Workspace`* > **License operations**.
2. Select Normalization Suggestions in the Discovery list view

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select a normalization suggestion record to view its details.
   For a detailed description of the normalization suggestion fields, see Normalization suggestions for discovery models.
4. Select **Accept** to update the discovery model with the correct values or click **Reject** to retain the manually normalized values.

   Note: Only the sam_admin role can accept or reject the normalization suggestions. For details on accepting or rejecting suggestions, see Normalization suggestions for discovery models.

Manually normalize a software model in the Software Asset Workspace

You can manually normalize a software discovery model that hasn't been fully normalized (partially normalized, publisher normalized, or match not found) to reconcile it.

Before you begin

Role required: sam_admin or sam_user

Procedure

1. Navigate to **All** > **Software asset** > *Software Asset Workspace* > **License operations** > **Discovery models**.
2. Select a discovery model record that has a normalization status of **Partially Normalized**, **Publisher Normalized**, or **Match Not Found**.
3. Select the ellipsis icon on the right hand side of the page.
4. Select **Normalize**.
   The normalization status changes to **Manually Normalized**.

Revert normalization in the workspace

You can revert the normalization of discovery models in the Software Asset Workspace.

Before you begin

Discovery models with a status of **Normalized**, **Partially Normalized**, or **Publisher Normalized** revert to the status of **Match Not Found**. Discovery models with a status of **Manually Normalized** and discovery models that have been normalized using pattern rules cannot be reverted.

Role required: sam_admin or sam_user

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations** > **Discovery models**.
2. Select a discovery model record.
3. Select **Revert Normalization**.
   Once the revert normalization process is complete, fields are reset to their original values and any rules associated with the software discovery model are deactivated.

Create parent-child relationships between software products

Create and define the parent-child relationships between your software products so that your child products can inherit life-cycle dates from their parent products.

Before you begin

Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. From the Software Asset Workspace, open the License operations view.
3. From the navigation menu of the License operations view, navigate to **Content** > **Parent-Child Relationship**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Software Product Parent-Child Relationship form

Field	Description
Parent product	Parent product that the specified child product inherits life-cycle dates from.
Child product	Child product that inherits life-cycle dates from the specified parent product. If you leave this field empty, a blanket parent-child relationship is created, in which all products under the same publisher as the specified parent product are considered its children and inherit its life-cycle dates.
Active	Option that indicates if the parent-child relationship is active.
Exclusion	Option to exclude the specified child product from any existing blanket parent-child relationships that are defined using the specified parent product.

6. Select **Save**.

Result
The Software Asset Management application automatically updates the life-cycle dates of the specified child product with the life-cycle dates of the specified parent product, given that the child product does not already have its own specific life-cycle dates.

Note: These life-cycle dates are automatically populated only in the Software Lifecycle Report [sam_sw_product_lifecycle_report] table. If you want to populate them in the Software Product Lifecycles [sam_sw_product_lifecycle] table, you must create custom life cycles. For more information on these tables and on custom life cycles, see Product life cycles.

What to do next
View life-cycle dates and other life-cycle information for both your parent and child software products in the Lifecycle management dashboard. You can access this dashboard by navigating to **Workspaces** > **Software Asset Workspace** > **Software asset analytics** > **Lifecycle management**. See Lifecycle management dashboard for more information on this dashboard.

View Export Classification Control Number (ECCN) mappings for your software products

View the list of ECCNs that are mapped to your software products. Use this information to identify the products that are subject to U.S. export control regulations.

Before you begin
Role required: sam_user

About this task
An ECCN is a five character alphanumeric key that helps you identify products that are subject to export control regulations under the U.S. Department of Commerce. Each ECCN defines the export licensing requirements for a product based on the product type and the corresponding

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

technical parameters. You can view the complete list of available ECCNs in the Commerce Control List (CCL), which is available on the Government Printing Office website as Supplement No. 1 to Part 774 of the Export Administration Regulations (EAR).

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. From the Software Asset Workspace, open the License operations view.
3. From the navigation menu of the License operations view, navigate to **Content** > **Software ECCN Mapping**.
4. View the complete list of ECCNs that are mapped to your software products.

> **Note:** ECCN mappings are curated and stored in the Software Asset Management Content Library. However, the Content Service team does not dictate any mappings between the ECCNs and software products. Each ECCN is mapped to an appropriate software product based only on either the official ECCN information that has been published by the given software publisher or the official classifications that have been provided by the Bureau of Industry and Security (BIS).

View or create software usage

View software usage records to track the usage of software products that you have created reclamation rules for. You can also create software usage records manually from third party integrations or Microsoft SCCM integrations.

About this task

If you're using Software Asset Workspace, the option to view or create software usage in Core UI is inactive.

The Software Usage [samp_sw_usage] table tracks down usage to the product level and not to the version or edition level.

Before you begin

Role required: sam_admin or sam_user

About this task

Use the following steps to create software usage records manually.

Procedure

1. Navigate to the Create New Software Usage form.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **Discovery** > **Software Usage**.
Software Asset Workspace	Navigate to **Workspaces** > **Software Asset Workspace** > **License operations** > **Discovery** > **Software usage**.

2. Select **New**.
3. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Software Usage form

Field	Description
Software usage	
Publisher	Publisher of the software product.
Product	Name of the software product.
Reclamation type	Type of reclamation used on the software installation. The options are **Total Usage Time** and **Last Used Date**. **Note:** If you select **Total Usage Time**, the Usage Metering Data form section appears. If you select **Last Used Date**, the Last Used Data form section appears.
Configuration Item	Configuration item (CI) that the software product is associated with. **Note:** If the CI **Status** or **Hardware Status** field changes to Retired or Stolen, installations that are related to the CI are deleted.
User	Name of the user who is using the software product.
Usage Metering Data **Note:** This form section appears only if the **Reclamation type** is set to **Total Usage Time**.	
Month	Month that the software product was used.
Year	Year that the software product was used.
Usage count	Number of times that the software product was accessed.
Total seconds used	Amount of time (in seconds) that the software product was used.
Last Used Data **Note:** This form section appears only if the **Reclamation type** is set to **Last Used Date**.	
Last used time	Date and time that the software product was last used.

4. Select **Save**.

Result
After the software usage is created, you can view it by navigating to **License operations** > **Discovery** > **Software usage**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View SAP engines in workspace

View the monthly engine usage measurements for SAP clients based on the license metric for each engine.

Before you begin

You can also view all the discovered users pulled from the SAP systems.

Role required: sam_admin or sam_user

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License Operations**.
2. Select **All SAP engines**.
3. Select on a SAP engine record to view more details on SAP system users and SAP Engine usage.

View SAP users in workspace

View all the discovered users pulled from the SAP systems in the Software Asset Workspace.

Before you begin

The Discovered Users [samp_discovered_user] table maps the discovered SAP users to system user records in the Users [sys_user] table.

Role required: sam_admin or sam_user

About this task

Starting with the Brazil release, the SAP users list includes a Deployment type column that displays whether each SAP system user belongs to an on-premises or private cloud. The deployment type value is collected from the SAP system during data collection.

For SAP S/4HANA Cloud, Private Edition deployment type users, each SAP system user record also includes a license type. The license type identifies the FUE (Full Usage Equivalent) Named User Type — Developer (GA), Advanced (GB), Core (GC), or Self-Service (GD). These values appear in the License classification column, which was previously called Named user type.

On software model records with the Product field set to SAP S/4HANA, you can view SAP system users in the related tab.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations**.
2. Select **All SAP users**.
3. Select a record to view details such as SAP user roles, SAP user active transactions, SAP user activities, and SAP web activities.
   - SAP User Roles [samp_sap_user_has_role]: SAP users and their assigned roles.
   - SAP User Active transactions [samp_named_user_type_has_transactions]: Data related to a named user's transaction activity on a SAP client. User transaction activity is based on SAP transaction codes, which are shortcuts for performing transactions or tasks on an SAP client. For example, the ME21N transaction code enables you to create a purchase order in SAP.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- SAP User Activity [samp_sap_user_activity]: Data related to a user's activity on a SAP client, such as the amount of time spent on a SAP system or the number of database records created or updated.
- SAP Web Activity [samp_sap_web_activity]: Data related to web activity or RFC connections performed on the SAP client, such as the number of calls or amount of data received or sent by each connection.

Create a custom named user type in workspace

Create a custom named user type that can be used with your SAP software entitlement in the Software Asset Workspace. Creating a custom named user type allows users to track licenses that are specific to their SAP systems.

Before you begin

Role required: sam_admin or sam_user

Note: The custom SAP named user types that you create directly on your ServiceNow instance are not reflected in your SAP system. You must make the same changes in your SAP system.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations**.
2. Select **SAP named user types**.
3. Select **New** and fill in the details.

Field	Description
Name	Name of custom named user.
Price list	Default price list.
Is developer	Indicates the user has a developer role.
Grant access to	Grant access to a named user type.
Value	Value associated with the named user type. This value can be either numbers or letters.
Rank	Priority of the named user type during reconciliation. Lower rank values take precedence.
Is licensable	Indicates the named user type license status.
Active	Indicates if the named user type is active.

4. Select **Save**.
   The named user type is added to the Named User Types list.

Create custom SAP price lists in workspace

Create custom SAP price lists so that you can track and manage SAP licenses based on the contracts that are specific to your SAP system.

Before you begin

Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The custom SAP prices lists that you create directly on your ServiceNow instance are not reflected in your SAP system. You must make the same changes in your SAP system.

Procedure

1. From the Software Asset Workspace, open the License operations view.
2. From the left navigation menu of the License operations view, select **Discovery** > **SAP price lists**.
3. Select **New**.
4. On the Create New Custom Price List form, fill in the fields.

Create New Custom Price List

Field	Description
Name	Name of the price list.
Id	Unique identifier for the price list.
Default named user type	Default named user type for the price list.
Active	Option that indicates if the price list is active.

5. Select **Save**.
   You are automatically redirected to the SAP price list record.
6. **Optional:** Associate SAP named user types with the custom SAP price list.

   a. On the **Named User Types** tab of the SAP price list record, select **New**.

   b. On the Create New Custom Named User Type form, fill in the fields.

Create New Custom Named User Type form

Field	Description
Name	Name of the named user type.
Price List	Price list that you want to associate the named user type with. This field populates automatically.
Is developer	Option that indicates if users with this named user type have a developer role.
Grants access to	Applications that the named user type has access to.
Value	Alphanumerical value that identifies the named user type.
Rank	Priority of the named user type during reconciliation. Lower rank values correlate with a higher priority during reconciliation.
Is licensable	Option that indicates if the named user type can be licensed.
Active	Option that indicates if the named user type is active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select **Save**.

d. Repeat steps a to c for each custom named user type that you want to add.

View SSO applications in workspace

View details related to applications that you can connect through a SSO provider in the Software Asset Workspace.

Before you begin

Role required: sam_admin or sam_user

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations**.
2. Select **SSO applications**.
   List of all connected and disconnected SSO applications is shown.
3. Select an application record to view additional details such as SSO application groups, users, SSO subscriptions, and reclamation candidates for an application.

SSO Applications related list

List	Description
SSO Application Users	All users that have direct access to the application, but not through membership in a group.
SSO Application Groups	All groups that have access to the application.
SSO Subscriptions	Total number of subscriptions for the application. A user may have both direct access to an app and have access through a group. But the user's access counts as only one subscription so as only one record in the SSO Subscriptions list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

List	Description
	Note: ○ Add the **SSO application role** column to see how the user is granted access to the application. If the value is a group, then the user has access through membership in that group. If the value is the user's name, then the user has direct access to the application. User subscriptions can't be reclaimed in Software Asset Management if the user has access to the application through a group membership. To reclaim the subscription, remove the user from the group in the Azure AD portal and set the reclamation candidate state to **Closed Complete**. ○ When SSO subscriptions are created through SSO application groups, the **Subscription assigned** value is empty. When the subscriptions are created through SSO Application Users, the **Subscription assigned** value shows the date of when the subscription is assigned to the user. After you upgrade to the Software Asset Management - SaaS License Management 13.1.0 version or later, the existing **Subscription assigned** values for the subscriptions that were created through SSO application groups turns empty.
Reclamation Candidates	Subscriptions that don't meet the usage requirements that are defined by the reclamation rule for the application.
SSO Group Software Model Mappings	SSO groups that are mapped to specific software models for managing licenses at the group level.

View SSO groups in workspace

View details related to all SSO groups that have access to a SSO application in the Software Asset Workspace.

Before you begin
Role required: sam_admin or sam_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations**.
2. Select **SSO groups**.
3. Select a group record to view additional details such as the users and child groups within that group.

View SSO users in workspace

View details of all users that have direct access to a SSO application in the Software Asset Workspace, but not through membership in a group.

Before you begin
Role required: sam_admin or sam_user

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations**.
2. Select **SSO users**.
3. Select a user record to view additional details related to the user.

Create a software client access record in workspace

Add a client access record to track and manage the users or devices that are accessing a particular version of your server software using a client access license (CAL).

Before you begin
Role required: sam_admin

Note: You can also use the sam_user role to view and read client access records. However, you cannot use this role to create client access records.

About this task
Software Asset Management uses client access records to reconcile server software based on the following license metrics:

Metric group	License metric
Citrix	• Per User • Per User/Device
Common	• User CAL • Device CAL • User/Device CAL
IBM	• Authorized User • Authorized User Value Unit • Employee User Value Unit • External User Value Unit

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Metric group	License metric
Microsoft	• User CAL • Device CAL • Per Core (with CAL)
Oracle	Named User Plus
CrowdStrike	• Reserved Hourly Average Sensor • Sensor Subscription **Note:** These license metrics are available with Yokohama Patch 1, Software Asset Management - SaaS License Management (sn_sam_saas_int) 15.0.8, and Software Asset Management (sn_itam_samp) 2.1.0 version onwards. If you are on any version for Yokohama below Patch 1, refer KB1801232.

License metrics are set on the software entitlement form and can be accessed from the **Metric Attributes** related list on the software model form.

Important: You can enable the Software Asset Management application to automatically create client access records for Oracle Database using the **Auto-generate client access for allocations** option on the corresponding software model. To use this option, you must request the Data Collection for Oracle Global Licensing and Advisory Services application from the ServiceNow Store. See Software model fields for more details on the **Auto-generate client access for allocations** option. See Request Data Collection for Oracle Global Licensing and Advisory Services (GLAS) for more details on the Data Collection for Oracle Global Licensing and Advisory Services application.

Procedure

1. From your ServiceNow instance, navigate to **Software asset** > **Software Asset Workspace**. The Software Asset Workspace launches in a new tab.
2. On the left navigation menu of the Software Asset Workspace, select **License operations**. The License operations view opens.
3. On the **Lists** tab of the License operations view, navigate to **Client access** > **Client access**.
4. Select **New**.
5. On the Create New Client Access form, fill in the fields.

Create New Client Access form

Field	Description
Name	Name of the client access record.
Software model	Software model of the server that you are granting users or devices access to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Type	Type of CAL that is associated with the client access record. Select one of the following options: ○ **User CAL**: Licenses each user that accesses the associated server, regardless of the number of devices that each user is using to access the server. For example, if two users are accessing Microsoft Windows Server, the corresponding software entitlement must include two User CALs. If you select this option, you can assign the associated User CALs to specific users. See step 7 for more details. ○ **Device CAL**: Licenses each device that accesses the specified server, regardless of the number of users that are using each device to access the server. For example, if two devices are accessing Microsoft Windows Server, the corresponding software entitlement must include two Device CALs. If you select this option, you can assign the associated Device CALs to specific devices. See step 7 for more details. ○ **User/Device CAL**: Licenses each user or device that accesses the associated server. **Note:** If you are using a Citrix software model, the User/Device CAL type is based on the user/device licenses that are assigned to your users or shared devices. For example, if two users and two devices are accessing Microsoft Windows Server, the corresponding software entitlement must include two User CALs and two Device CALs. If you select this option, you can assign the associated User and Device CALs to specific users and devices. See step 7 for more details. ○ **Authorized User**: Licenses each user who accesses an IBM software product.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This CAL type is applicable to IBM software only. ○ **Authorized User Value Unit**: Licenses the number of select users who access an IBM software product. **Note:** This CAL type is applicable to IBM software only. ○ **Employee User Value Unit**: Licenses the total number of users within your organization who access an IBM software product. **Note:** This CAL type is applicable to IBM software only. ○ **External User Value Unit**: Licenses the total number of users outside your organization who access an IBM software product. **Note:** This CAL type is applicable to IBM software only. ○ **Reserved Hourly Average Sensor**: This metric counts the number of unique active endpoints per clock-hour and averages them over a rolling 28-day period. The count of Reserved Hourly Average Sensor Licenses resets at the start of each clock-hour. ○ **Sensor Subscription**: This metric calculates license usage by averaging endpoint counts over four consecutive weeks. Weekly endpoint counts are based on the total number of endpoints consumed in the previous seven days. **Note:** The Reserved Hourly Average Sensor and Sensor Subscription license metrics are applicable only for CrowdStrike and are available with Software Asset Management Yokohama Patch 1 and Software Asset Management 2.1.0 version onwards.
WebLogic application	Oracle WebLogic Server application to which your users or devices are granted access.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Note: This field appears only if you select an Oracle WebLogic Server software model.	
Database instance **Note:** This field appears only if you select an Oracle Database software model.	Oracle database instance that accesses and manages the data in your Oracle database.
Source **Note:** This field appears only if you select an Oracle Database software model.	Source of your Oracle data. This field is automatically set to one of the following options: ○ **ServiceNow**: Indicates that the client access record data was generated automatically through the SAM - Sync Auto-generated Client Access with DB Server Users scheduled job, which runs daily or on-demand. ○ **Internal**: Indicates that the client access record data was added manually.
Count	Number of unique users or devices that are granted access to the associated server. **Note:** On automatically generated client access records for Oracle Database, this field populates automatically based on the number of users or devices that are currently added to the record. See step 7 for more information on how to add users or devices to the client access record. **Note:** If you are using a Citrix software model and User/Device CAL type, the **Count** field is based on the number of user/device licenses that are assigned to your users or shared devices.
PaaS **Note:** This field appears only if you select an Oracle Database software model.	Option to indicate whether your Oracle database instance is managed by the Amazon Relational Database Service (RDS) on Amazon Web Services (AWS).
Cost Center	Cost center of the users or devices that are granted access to the associated server.
Department	Business department of the users or devices that are granted access to the associated server.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Location	Geographic location of the users or devices that are granted access to the associated server.
Company	Company of the users or devices that are granted access to the associated server.

6. Select **Save**.
   The form reloads with the **Users** and **Devices** tabs.
7. To assign the associated CALs to specific users or devices, add those users or devices to your client access record based on the CAL type that you selected in the **Type** field.
   By assigning CALs to specific users or devices, you can prevent those users or devices from being counted multiple times across different client access records during reconciliation.
   - If you set the **Type** field to **User CAL**, **User/Device CAL**, **Authorized User**, **Authorized User Value Unit**, **Employee User Value Unit**, or **External User Value Unit**, add the users that you want to assign your user-based CAL to.

     Note: If you are using a Citrix software model and User/Device CAL type, add the users that you want to assign a user/device license to.

     a. Select the **Users** tab and then click **New**.

        The Create New Client Access User Breakdown form opens in a new tab.

     b. In the **User** field, search for and select a user that you want to assign a user-based CAL to.

        The **Device**, **Active**, **User Type**, and **Source** fields populate automatically for the specified user. However, you can modify the **Device**, **Active**, and **User type** fields as needed.

     c. Select **Save**.

     d. Close the form to return to your client access record.

     e. Repeat steps a-d for each user that you want to assign a user-based CAL to.
   - If you set the **Type** field to **Device CAL** or **User/Device CAL**, add the devices that you want to assign your device CALs to.

     Note: If you are using a Citrix software model and User/Device CAL type, add the devices that you want to assign a user/device license to.

     a. Select the **Devices** tab and then select **New**.

        The Create New Client Access Device Breakdown form opens in a new tab.

     b. In the **Device** field, search for and select a device that you want to assign a device CAL to.

        The **Active** and **Source** fields populate automatically for the specified device. However, you can modify the **Active** field as needed.

     c. Select **Save**.

     d. Close the form to return to your client access record.

     e. Repeat steps a-d for each device that you want to assign a device CAL to.
8. To track and license the configuration items (CIs) that the associated server is installed on, add them to the client access record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: This step is not applicable if you have enabled the **License all installs accessed by clients** option on the associated software model. If this option is enabled, CIs are licensed based on conditions that you specify on the software model, such as software install conditions. See Software model fields for more details on this option.

For Windows Server, each server installation requires Per Core (with CAL) rights that are licensed separately from the User and Device CAL rights in associated client access records. Other products like Oracle Java do not require rights to be licensed separately for server installations. For example, if you use CALs to license the users and devices that are accessing Oracle Java, you can enable Software Asset Management to automatically mark the corresponding Oracle Java installations as licensed. In this scenario, Software Asset Management licenses the Oracle Java installations as part of CAL licensing.

To enable this capability, you must add all CIs that a given server is installed on to the associated client access record. By specifying these CIs, you can enable Software Asset Management to determine which server installations your users and devices are connected to. After all users and devices on the client access record are licensed, all server installations on the specified CIs are also marked as licensed. No additional licenses are consumed for these installations.

a. Select the **Devices with Installations** tab and then click **New**.

b. In the **Device** field of the Create New Client Access Installed Device form, search for and select a CI that the associated server is installed on.
The **Active** field populates automatically for the specified CI. However, you can modify this field as needed.

c. Select **Save**.

d. Close the form to return to your client access record.

e. Repeat steps a-d for each CI that the associated server is installed on.

What to do next

After you create a client access record, reconciliation runs on the associated server software as a scheduled job or on-demand. You can view your reconciliation results in the License usage view. Use these results to determine your license compliance position and to remediate any non-compliance.

You can remediate non-compliance for your server software using the following remediation options:

- **Purchase Rights**: Generates a purchase order when the number of rights needed is greater than the number of rights owned across all client access records for the specified server software.
- **Create Allocations**: Allocates rights to unlicensed users or devices that have been added to the client access records for the specified server software.
- **Remove Allocations**: Removes rights from licensed users or devices when sufficient rights are unavailable.

Create a resource value record

Create a resource value record for each software model for which you want to calculate licensing requirements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sam_admin

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace** > **License operations** > **Resource Value**.
2. Select **New**.
3. On the form, fill in the fields.

Resource Value form

Field	Description
Name	Name of the resource value.
Software model	Software model of the software product that the resource value is associated with.
Company	Company of the associated resource value record.
Location	Physical location of the associated resource value record.
Units consumed	Total number of resource value units of the associated software product that you're currently consuming. For example, if you're protecting 50 terabytes of data using a data protection software product, set the **Units consumed** field to 50. For the Java SE software model with the Employee license metric, the **Units consumed** field must be set to the number of employees consuming the licenses.
Department	Department that the resource value record is assigned to.
Cost Center	Cost center that is financially responsible for the resource value.

4. Select **Save**.

Note: You can create multiple resource value records for the same software model and give them unique names. All the resource value records with the same software model are taken into consideration before reconciliation is run.

Result
The resource value record that you created appears in the Resource Value list view.

Create user subscriptions in the workspace

Create software subscriptions for SaaS and SSO applications for users in the Software Asset Workspace.

Before you begin
The User subscription option is available only if the Software Asset Management - SaaS License Management (sn_sam_saas_int) plugin is activated.

Role required: sam_admin or sam_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task
If you're using Software Asset Workspace, the option to create user subscriptions in Core UI is inactive.

Procedure
1. Navigate to the Create New Software Subscription form.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **Software Subscriptions**.
Software Asset Workspace	**a.** Navigate to **Workspaces** > **Software Asset Workspace** > **License operations**. **b.** Select **User subscription**.

2. Select **New**.
3. On the Create New Software Subscription form, fill in the fields.

   For more information on the Software subscription form fields and their descriptions, see Software subscription fields.
4. Select **Save**.

Related topics
- Software models and software entitlements
- Create a software model in the Software Asset Workspace
- Create entitlements in workspace

Create a product workload mapping for CrowdStrike products
Create a product workload mapping for your CrowdStrike products for accurately associating specific products with the types of workloads they manage.

Before you begin
You must create a CrowdStrike integration profile before creating a workload mapping. For more information, see Integrating with CrowdStrike.

Role required: sam_admin or sam_integrator

About this task
Workload mapping is essential for accurately associating specific products with the types of workloads they manage. For example, servers, desktops, and containers. This is because CrowdStrike provides consumption data for endpoints or workloads instead of consumption data for specific products. Workload mapping enables you to map workloads that are consumed against each product. Based on the workload mapping that you create, the consumption across workloads is aggregated for each product, preventing over- or under-counting. This new approach replaces previous methods and aligns with how CrowdStrike now tracks usage, ensuring accurate compliance.

Procedure
1. Navigate to **Software Asset Workspace** > **License operations** > **User subscription** > **CrowdStrike product workload mappings**.
2. Select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the CrowdStrike Product Workload Mapping form, fill in the fields.

CrowdStrike Product Workload Mapping form

Field	Description
Integration profile	The integration profile for which the workload mapping is being created. This field is automatically populated when you navigate to the product workload mapping form from a particular integration profile.
Workload	Endpoints are physical or virtual devices, such as a computer, server, laptop, desktop computer, mobile, cellular, container, pod, or virtual machine image. Endpoints are sometimes referred to as workloads. For example, ○ containers ○ public_cloud_with_containers ○ servers_without_containers ○ chrome_os
Software model	Profile of the software, which includes publisher, version, and discovery map.
License metric	License metric for the selected software model. ○ **Reserved Hourly Average Sensor**: This metric counts the number of unique active endpoints per clock-hour and averages them over a rolling 28-day period. The count of Reserved Hourly Average Sensor Licenses resets at the start of each clock-hour. ○ **Sensor Subscription**: This metric calculates license usage by averaging endpoint counts over four consecutive weeks. Weekly endpoint counts are based on the total number of endpoints consumed in the previous seven days.

4. Select **Save**.

Result

The mapping that you have created appears in the CrowdStrike product workload mapping list.

Related topics

Integrating with CrowdStrike

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View publisher part number (PPN) suggestions in workspace

View Content Service suggestions for your custom PPNs and DMAPS in the Software Asset Workspace.

Before you begin

PPN suggestions are available only if a corresponding match is found for your custom PPN in the Content Service. The PPN suggestion records are stored in the Part number suggestions [samp_sw_part_number_suggestion] table.

For information on custom part numbers, see Custom publisher part numbers (PPN) and Add a custom part number.

Role required: sam_admin.

Procedure

1. Navigate to **All** > **Software asset** > **Software Asset Workspace** > **License operations**.
   You can also view the part number suggestions from the **License Usage** view by navigating to the Publisher details page and the **Progress indicators** section.
2. Select **Part number suggestions** from the Content suggestions list view.
3. Open a suggestion record to view the Part number suggestion page.
   You can view the custom PPN details in the top part of the Part number suggestion page. The second half of the page contains the suggested part number details. All the entitlements where the custom PPN is used appear in the **Impacted entitlements** tab. All the software models where the custom DMAP is used appear in the **Impacted software models** tab. If no impacted software models exist, then this tab doesn't appear.
4. Select **Accept** or **Reject**.
   - **Accept**: The Content Service PPN and DMAP replace the custom PPN and DMAP. In the impacted entitlement, the Content Service PPN is replaced. Similarly, the Content Service DMAP is replaced on the software model.
   - **Reject**: The status of this record changes to rejected and you continue to use the custom PPN.

Manage phase-wise Software Asset Management implementation

Carry out phase-wise Software Asset Management implementation by publishing only on a few software products that you want to manage initially. You can also remove the software products from the published list when you no longer want to manage those products.

Set the domain-specific property to publish your software products

Use the domain separation application property of Software Asset Management to set the publish software products property for specific domains.

Before you begin

To set up domain separation application properties for Software Asset Management, you must activate the Domain Support - Domain Extensions Installer (com.glide.domain.msp_extensions.installer) plugin on your ServiceNow instance.

Role required: sam_admin

About this task

The *com.snc.samp.manage.published.product* application property enables you to specify the domains for which you want to enable publishing the software products in a phase-wise implementation of Software Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Software Asset Management** > **Administration** > **Application Properties**.
2. From the list of available application properties, select **com.snc.samp.manage.published.products**.
3. Create or update an application property value.
   - To create an application property value, select **New**.
   - To update an existing application property value, select that application property value from the list of available values.
4. On the form, fill in the fields.

Application Property Values form

Field	Description
Value	Value of the application property. You can specify one of the following: ○ **true** to enable the property. ○ **false** to disable the property.
Domain	Domain that you want the application property value to apply to.

5. Save the application property values.
   - To update an existing application property value, select **Update.**
   - To save a new application property value, select **Submit**.

What to do next

Publish the software products that you want to manage as part of phase-wise implementation of Software Asset Management. For more information, see Publish a specific set of your software products.

Publish a specific set of your software products

Report only on the licensable software products that are part of the current implementation phase of Software Asset Management by publishing those software products. By publishing only a few software products initially, you can assess the initial progress and gradually increase the scope of the implementation.

Before you begin

To be able to publish your software products, enable either the *com.snc.samp.manage.published.products* system property or the *com.snc.samp.manage.published.products* application property on your ServiceNow instance.

Note: The application property is domain-specific and available only on a ServiceNow instance that has domain separation activated for Software Asset Management. For more information, see Domain separation and Software Asset Management and Set the domain-specific property to publish your software products.

Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Note: To view accurate data on the reports, you must run software reconciliation whenever the following occur:

- The system property *com.snc.samp.manage.published.products* is updated.
- The software products are published or removed from the list of published software.

Procedure

1. Navigate to **All** > **Software Asset Management Workspace** > **License operations**.
2. From the **SAM Implementation** list, select **Published products**.
3. Select **Add**.

   Note: If the **Add** option isn't available, make sure the *com.snc.samp.manage.published.products* property is enabled.

4. In the **Add to published products** dialog box, select the licensable software products that you want to publish and select **Add**.

   Note:

   When you publish a software product that is part of a suite, messages with links that contain the details of the parent software suite and its child software components are shown. You can view the details and publish these software products if necessary.

Result

- The software products are added to the Published products list that is grouped by the publisher.
- After you publish the products and run software reconciliation, you can view reports specific to only those published products in the License usage view and Software asset overview.

Remove published software products

Remove published software products that you no longer manage or report on as part of your Software Asset Management implementation.

Before you begin

To be able to remove software products from the list of published software products, make sure that either the *com.snc.samp.manage.published.products* system property or the *com.snc.samp.manage.published.products* application property is enabled on your ServiceNow instance.

Note: The application property is domain-specific and available only on a ServiceNow instance that has domain separation activated for Software Asset Management. For more information, see Domain separation and Software Asset Management and Set the domain-specific property to publish your software products.

Role required: sam_admin

Procedure

1. Navigate to **All** > **Software Asset Workspace** > **License operations**.
2. From the **SAM Implementation** list, select **Published products**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select the published software products that you want to remove from the list.
4. Select **Remove**.

Result
The software products that you removed are no longer shown in the Published products list.

Create product install conditions

Create product install conditions in the Software Asset Workspace that apply across all software models of a product during reconciliation.

Before you begin
Installs that do not meet the required product install conditions will be included in the reconciliation process; however, they are likely to be flagged as unlicensed.

To create product install conditions, you must request and activate the Software Asset Workspace (sn_sam_workspace) store application. For details on requesting and activating the Software Asset Workspace (sn_sam_workspace) store application, see Request Software Asset Management.

Role required: sam_admin

About this task
Install conditions define where a software product can be installed. Product install conditions account for all the software model installations of a product during reconciliation.

Note: If you want to set up install conditions for specific software models and not the entire software product suite, you can choose to add software install conditions. For details on adding software install conditions, see Create a software model in the Software Asset Workspace.

Procedure
1. Navigate to **Software Asset** > **Software Asset Workspace** > **License operations** > **Licensing**.
2. Select **Product install condition**.
3. Select **New**.
4. From the list of available products, select a product.
5. Select **Set conditions**.
6. Add filter conditions that contain a field, operator, and value.
   You can add multiple install conditions to a software product using the following options:
   - **or**: Enables you to specify any of the conditions that a software installation can meet to be included in reconciliation.
   - **and**: Enables you to specify all the conditions that a software installation must meet to be included in reconciliation.
   - **+ New condition set**: Enables you to specify additional sets of conditions that a software installation can meet to be included in reconciliation.
7. Select **Set**.
8. After setting up the install conditions successfully, select **Save**.
   The install conditions are added for the complete suite of the software product. You can view the install conditions you have created on the Product install condition landing page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create or update an override license cost record

Create or update an override license cost record for your software entitlements based on your requirements.

Before you begin
Role required: sam_user, sam_admin

About this task
You can manually add or update the override license cost information for your software models and entitlements. When you create an entitlement for the Employee license metric, override license cost records are populated for Oracle Java, based on the data present in the Price tier [samp_price_tier] table. You can update the existing override license cost records according to the licensing agreement. For details on the tier-based pricing model, see Pricing model for Oracle Java SE Universal.

Procedure
1. Navigate to **Software Asset Workspace** > **License operations**.
2. Select the target software model that you want to create or update the override license cost for.
3. Select the **Override License Costs** tab.
4. Select **New/Edit ranges**.
   - If you select **New**, the lower limit is calculated based on the employee count range in the Price tier [samp_price_tier] table, incrementing the previous upper limit by 1. For example, if the previous employee range is 40000-49999, then the lower limit is automatically populated as 50,000 for a new record.
   - If you select **Edit ranges**, all the existing records are set to inactive. You can select **Activate** after completing your updates to override license cost ranges.
5. On the form, fill in the fields.
   For details on the override license cost fields and descriptions, see Override License Costs tab.

   Note: You can revert your changes to the default values by selecting **Restore to default**.

6. Select **Save**.

Result
The override license cost record you created or modified appears in the **Override License Cost** list view. The following details are displayed for each record:

- Metric group
- License metric
- License cost
- License and maintenance cost

Create an unrecognized publisher integration mapping

Create an unrecognized publisher-to-subscription integration mapping for your engineering applications. You can create these mappings when the content resolver doesn't automatically identify a specific publisher.

Before you begin
Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Software Asset Workspace** > **License operations** > **Engineering apps integration** > **Unrecognized publisher integration map**.
2. Select **New**.
3. On the Create New Unrecognized Publisher Integration Map form, enter the name of the unrecognized publisher in the **Publisher** field.
4. Select the appropriate subscription integration for the publisher using the lookup ( ) icon.
5. Select **Save**.

Result

The publisher to subscription integration mapping that you have created appears in the list of unrecognized publisher integration maps.

Create an end of life workflow request for your software products

Manage risks associated with your software product installations that have reached the end of life (EOL) or are reaching EOL in the next 18 months. You can create an EOL request and take the required action for the EOL software.

Before you begin

Role required:

- Create or modify an EOL request: sam_admin, itil users
- Read an EOL request: sam_user, users with an itil role to whom a task is assigned
- Complete an EOL task: sam_user, users with an itil role to whom a task is assigned

About this task

When software products reach EOL, end of support, or end of extended support, their risk of failure increases. You can choose to remove such software products that are reaching or have reached EOL, upgrade them to the latest software version, or purchase additional support for their maintenance. The EOL workflow takes you through the process of completing your change request based on the action you choose for your EOL software products. If you want to purchase additional support for your EOL software, you can create a purchase order.

Note: You must have the Procurement plugin (com.snc.procurement) activated to complete a purchase order.

The EOL workflow can also be completed using the Software End of Life Flow in the Flow Designer application. You can customize the Software End of Life Flow according to your requirement by creating a copy of the flow and customizing the copy that you have created.

Procedure

1. Navigate to **Software Asset Workspace** > **Software asset analytics** > **Lifecycle management**.
2. On the Lifecycle management dashboard, select the **Upcoming end of life product lifecycles in next 18 months** report or the **Current and past end of life product lifecycles** report.

   The End of life products page displays the current and upcoming life-cycle phases calculated using the Software Product Lifecycle [sam_sw_product_lifecyle] table. For more details, see Software models and software entitlements.
3. Select a record that has the **Current phase** as either End of Support, End of Extended Support, or End of Life.
   The Software Product Lifecycle report opens for the selected record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: You can also access the Software Product Lifecycle report by navigating to **Software Asset Workspace** > **License usage** > **Reports**.

4. Create an EOL request by selecting **Manage EOL risk**.

   The product details in the Software EOL request form are populated from the Software Product Lifecycle Report [sam_sw_product_lifecycle_report] table.

5. On the Software EOL request form, fill in the fields.
   For details on the fields and descriptions, see Software EOL request fields.
6. Start the EOL workflow to take required action for your EOL software.

   a. Select **Start EOL Workflow**.

   b. Select the **Software EOL Tasks** tab.

   c. On the Software EOL task form, fill in the fields.
   For details on the form fields and descriptions, see Software EOL tasks tab.

   d. Complete the subtasks for the parent task by selecting the **Software EOL Subtasks** tab.

   Note: If a parent task has subtasks, you must close all the subtasks.

   e. Repeat steps b through d for all the tasks listed on the **Software EOL Tasks** tab.

   - If you select one of the following values in the **Action** field on the **Software EOL Tasks** tab, a change request is generated:
     - Remove EOL software
     - Upgrade
     - Move to Azure

     For details on removing an EOL software product, see Complete the end of life workflow request for your software product. For details on completing a change request and the role required for it, see Process a change request.

   - If you select **Purchase support** in the **Action** field and select the **Auto create PO** option in the EOL task, a purchase order is created. For details on completing a purchase order and the role required for it, see Create a purchase order line item.

   After you complete the parent task, the **Stage** field is updated to reflect the stage of the task. Additionally, the **Action initiated** field is updated to reflect the action you have selected for the EOL request.

   Note: You can cancel the EOL workflow anytime by selecting the **More Actions** ellipsis icon and then selecting **Cancel EOL request**.

Result
After the change request or the purchase order is complete, the workflow request is complete.

Complete the end of life workflow request for your software product

Perform all the tasks that are required to remove the end of life (EOL) software products from your asset inventory.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Before you proceed with removing the EOL software, you must start an EOL workflow request. For details, see Create an end of life workflow request for your software products.

If you set the **Action** field to **Remove EOL Software** in the Decide on IT strategy task, you must perform these software EOL tasks.

Role required: sam_user, users with an itil role to whom a task is assigned

About this task

To close an EOL request, you must complete and close all the tasks required to complete the workflow. The following procedure explains how to close the EOL request, when you set the **Action** field to **Remove EOL Software** in the Decide on IT strategy task. You can apply the same approach to close the EOL request for the following possible values in the **Action** field in the Decide on IT strategy task:

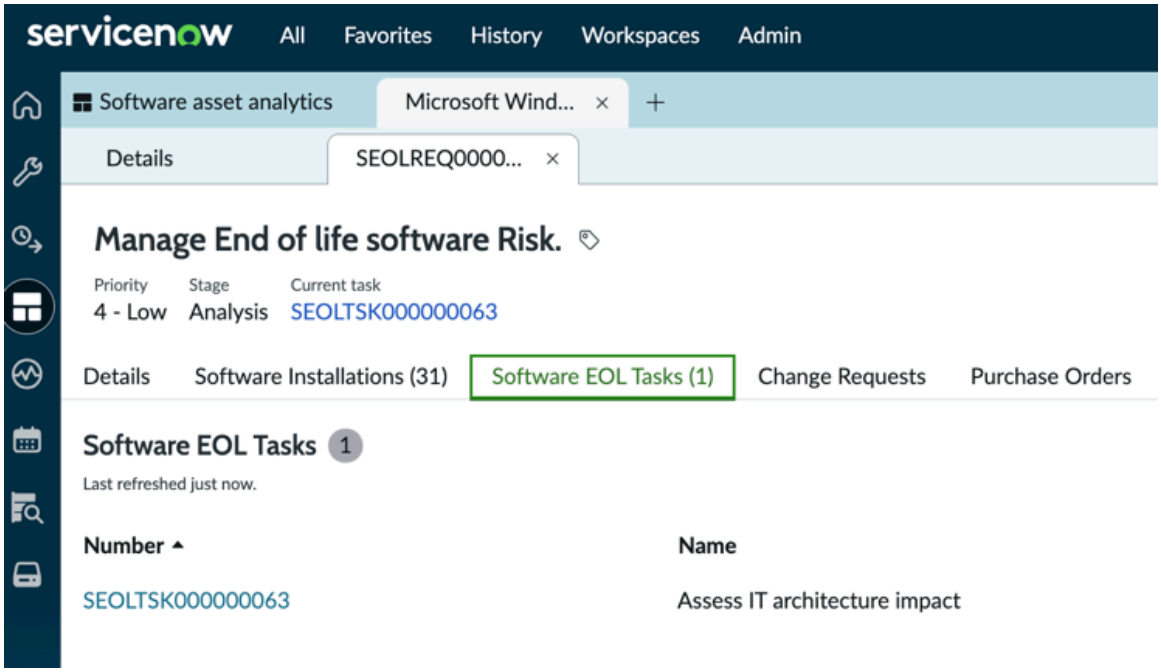
- Upgrade
- Purchase support
- Move to Azure
- Accept risk

Additionally, the EOL workflow can be completed using the Software End of Life Flow in the Flow Designer application. You can customize the Software End of Life Flow according to your requirement by creating a copy of the flow and customizing the copy that you have created.

Procedure

1. Navigate to **Software Asset Workspace** > **Software Asset Analytics** > **Lifecycle management**.
2. On the Lifecycle management dashboard, open the End of life (EOL) products page by selecting the **Upcoming end of life product lifecycles in next 18 months** report or the **Current and past end of life product lifecycles** report.
3. From the list of available EOL products, select the product for which you want to complete the EOL workflow.
4. On the product record, select the **Software EOL Requests** tab.
5. From the list of available software EOL requests, select the request number for which you want to complete the tasks.
6. Complete the first task, which is the Assess IT architecture impact task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



a. On the **Software EOL tasks** tab, select the task number for the Assess IT architecture impact task.

b. On the **Details** tab of the Assess IT architecture impact task, fill in the fields.
For details on the form fields and their description, see Software EOL tasks tab.

c. Complete the subtasks for the Assess IT architecture impact task by selecting the **Software EOL Subtasks** tab.

> **Note:** If a parent task includes subtasks, you must close all the subtasks. After you close all the subtasks, the parent task is automatically updated with a state of Closed Complete. Additionally, a new task appears on the **Software EOL tasks** tab only after you have closed and completed the preceding task.

7. Complete the Assess IT security impact task.

a. On the **Software EOL tasks** tab, select the task number for the Assess IT security impact task.

b. On the **Details** tab of the Assess IT security impact task, fill in the fields.
For details on the form fields and their description, see Software EOL tasks tab.

c. Complete the subtasks for the Assess IT security impact task by selecting the **Software EOL Subtasks** tab.

8. Complete the Decide on IT strategy task.

a. On the **Software EOL tasks** tab, select the task number for the Decide on IT strategy task.

b. On the **Details** tab, select **Remove EOL software** in the **Action** field.
For details on the form fields and their description, see Software EOL tasks tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select **Close Task**.
The Decide on IT strategy task is automatically updated with a state of Closed Complete. The corresponding Assess software licensing impact task appears in the list view on the **Software EOL Tasks** tab.

9. Complete the Assess software licensing impact task.

a. On the **Software EOL tasks** tab, select the task number for the Assess software licensing impact task.

b. On the **Details** tab of the Assess software licensing impact task, fill in the fields.
For details on the form fields and their description, see Software EOL tasks tab.

c. Select **Close Task**.
The Assess software licensing impact task is automatically updated with a state of Closed Complete. The corresponding Complete secure backup task appears in the list view on the **Software EOL Tasks** tab.

10. Complete the Complete secure backup task.

a. On the **Software EOL tasks** tab, select the task number for the Complete secure backup task.

b. On the **Details** tab of the Complete secure backup task, fill in the fields.
For details on the form fields and their description, see Software EOL tasks tab.

c. Select **Close Task**.
The Complete secure backup task is automatically updated with a state of Closed Complete. The corresponding Create IT change plans task appears in the list view on the **Software EOL Tasks** tab.

11. Complete the Create IT change plans task.

a. On the **Software EOL tasks** tab, select the task number for the Create IT change plans task.

b. On the **Details** tab of the Create IT change plans task, fill in the fields.
For details on the form fields and their description, see Software EOL tasks tab.

c. Select **Close Task**.
The Create IT change plans task is automatically updated with a state of Closed Complete. A change request appears on the **Change Requests** tab.

12. Select the change request and review the values that are automatically populated in the Change Request form.
For details on completing a change request, see Process a change request.

Result
After the change request is complete, the workflow request is also complete.

Create demand to rationalize software applications

Create demands to rationalize SaaS and SSO applications by discontinuing software subscriptions, reducing software usage, and migrating users to approved software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: sam_admin or sam_user

Note: The sam_admin and sam_user roles must have the it_demand_user role to create demand.

The PPM Standard (com.snc.financial_planning_pmo) plugin must be installed to create demands.

The Software Asset Management application includes the following demand actions that are ready for you to use:

- Discontinue after expiration
- Migrate to approved product
- Discontinue immediately
- Reclaim licenses
- No action

About this task

Use the Overlapping usage view to drive SaaS and SSO application rationalization by viewing the feature level usage of each application. For more information, see Overlapping usage view.

Procedure

1. Navigate to **Software Asset Workspace** > **Overlapping usage**.
2. Select the **Application feature usage** tab.
3. Select the application in a category for which you want to create a demand.
4. Select **Create demand**.
   The **Create demand** option is available only when you select an application that you want to create a demand for.
5. On the form, fill in the fields.

Software Asset Demand

Field	Description
Name	Name of the demand.
Number	Unique auto-generated identification number for the demand.
Submission status	Stage of the demand record. ○ Draft ○ Submitted ○ Screening ○ Qualified ○ Approved
Start date	Start date for the demand. The field name is replaced by **Planned start date** when the demand type is converted to a Project.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: When you change the planned start date of a demand or project, the associated cost and resource plans also change.
Due date	Requested completion date for the demand. The field name is replaced by **Planned end date** when the demand type is converted to a Project.
Category	Software category of the demand. ○ Strategic ○ Operational
Type	Type of demand. ○ Enhancement ○ Project ○ Change ○ Defect The **Category** field selection determines the selections available in this field.
Assessment required	Option for enabling the assessments for the demand. By default, the field is selected. When clear, the assessment questionnaire isn't triggered for the demand. When this field is clear, and you reset the demand to **Draft**, the value for the **Assessment Required** field is retained as clear.

6. **Optional:** Select the **Demand Requirements** tab to view the details of the already-created requirements.
   You can also create a demand requirement. For more information, see Create a demand requirement.
7. Select **Save**.

Result
The demand is created with the **Submission status** field set to **Submitted**.

What to do next
Use the ServiceNow® Demand Management application to approve and complete the demand. For more information, see Demand Management.

You can create a project for the demand by selecting the **Create Project** related link. A project enables you to track the status, percent complete, and duration of the work required to

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

accomplish the demand. You can also create project tasks to define the work items that are required to complete the project. For more information, see Project Management.

To view all Software Asset Management demands, navigate to **Software Asset** > **Software Asset Demand** > **Demands**.

To view all Software Asset Management demand requirements, navigate to **Software Asset** > **Software Asset Demand** > **Demand Requirements**.

Create a demand requirement

Create a demand requirement for rationalizing your SaaS and SSO applications.

Before you begin

Role required: sam_admin or sam_user

Note: The sam_admin and sam_user roles must have the it_demand_user role to create demand.

The PPM Standard (com.snc.financial_planning_pmo) plugin must be installed to create demands.

Procedure

1. Navigate to **Software Asset Workspace** > **Overlapping usage**.
2. Select the **Application feature usage** tab.
3. Select the application in a category for which you want to create a demand.
4. Select **Create demand**.
   The **Create demand** option is available only when you select an application that you want to create a demand for.
5. Select the **Demand Requirements** tab.
6. Select **New**.
   All the fields are auto-populated.
7. On the form, fill in the fields.

Create New Demand Requirement

Field	Description
Demand Requirement	
Number	Unique auto-generated identification number for the demand requirement.
Software asset demand	Software asset demand for which you're creating the requirement.
Product	Product or application for which the demand requirement is created.
Main category	Category of the application. For example, if you select **Zoom** in the **Product** field, the **Main category** field would be set to **Video Conferencing**.
Action	Action items identified for the demand.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Discontinue after expiration ○ Migrate to approved product ○ Discontinue immediately ○ Reclaim licenses ○ No action
Description	Description of the demand requirement.
Notes	Additional notes for the demand requirement.
Spend Information	
Spend amount	Total spend on the application based on entitlements.

8. Select **Save**.

Result
The demand requirement for the demand is created. You can view the created demand on the Software Asset Demand [samp_demand] table.

What to do next
To view all Software Asset Management demand requirements, navigate to **Software Asset** > **Software Asset Demand** > **Demand Requirements**.

Install Content library portal for Software Asset Management

Install the Content library portal store application to view the data stored in the Software Asset Management Content Service.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- The Content library portal application requires the following plugins. Ensure that these plugins are activated before you install the Content library portal application.

Required ServiceNow plugins

Activate Software Asset Management Professional Master Workspace (com.sn_samp_master_ws) plugin

This plugin will internally activate the Software Asset Management Professional (com.sn_samp_master) plugin and Software Asset Workspace (sn_sam_workspace) store application.

- The Software Asset Management Professional (com.sn_samp_master) plugin loads the following Software Asset Management Professional plugins in one step:
  - Software Asset Management Professional (com.snc.samp) plugin
  - All publisher pack add-on plugins
  - Software Asset Management UI Components (com.sn_samp_workbench)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To enable SaaS License Management, you must request the Software Asset Management — SaaS License Management Integrations (sn_sam_saas_int) plugin separately from the ServiceNow Store.

- The Software Asset Workspace (sn_sam_workspace) store application is required to use the Software Asset Workspace, the new user interface of the Software Asset Management application.

AI Search plugin (com.glide.ais)

Activates AI search functionality.

Note: If you have installed Software Asset Management Professional (com.sn_samp_master) plugin, you can view data stored in the Software Asset Management Content service. If you have installed both Software Asset Management Professional (com.sn_samp_master) and Hardware Asset Management Professional (com.sn_hamp) plugins, you can view both Software Asset Management and Hardware Asset Management data stored in the Content service. For more information about installing Content lookup portal for Hardware Asset Management, see Install Content lookup to view Hardware Asset Management data.

Role required: sam_admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Content library portal application using the filter criteria and search bar.

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

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install the Content library portal application.
4. Select **Install**.

Use manage contract repository agentic workflow in the Software Asset Workspace

Use the manage contract repository agentic workflow to improve productivity by extracting metadata and obligations automatically from signed contracts. Set the contract reminder dates for contract renewal or termination.

Manage contract repository overview

The manage contract repository agentic workflow uses an AI agent to do the following sequentially.

- Extract metadata from signed contracts.
- Calculate the contract reminder date for renewal and termination.
- Extract obligations from signed contracts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Metadata extraction and contract reminders

The AI agent uses the Contract metadata extraction skill to extract key metadata from signed contracts. Once the metadata extraction is complete, you can open the playbook to review the extracted information and set the contract reminder date.

The following workflow explains the metadata extraction and contract reminder setup process.

1. As a Contract Admin with the AI role, activate the contract metadata extraction skill in the AI Admin Hub console.

   For more information, see Configure the manage contract repository agentic workflow for Software Asset Management.

2. Navigate to *Software Asset Workspace* > **License operations** > **Contracts** > **Software contracts** and select **New**.
3. Save the contract record.
4. Select the **Initiate contract extraction** button and upload a signed contract file.
5. After the contract metadata and reminders extraction is complete, the Contract Manager with the AI role receives a notification indicating that the metadata is ready for review.
6. The Contract Manager reviews the extracted metadata and submits it to update the contract repository.
7. The contract reminder date is then calculated based on the following factors:
   - Contract end date
   - Presence of auto-renewal clause
   - Notice period for contract renewal or termination

   Note: If the renewal notice period and termination notice period aren't available, it uses the configured default notice period. For more information, see Set the default notice period for the Manage contract repository agentic workflow.

8. The Contract Manager sets the contract reminders in the playbook by reviewing the calculated date and configuring the recipient list for the reminders.

For more information, see Review AI-extracted metadata and contract reminder date in the Software Asset Workspace.

Obligation extraction

The AI agent uses contract obligation extraction skill to extract key contractual obligations from contracts. Once extracted, you can review the obligations within the contract playbook and choose to accept or reject them. Accepted obligations are added as records in the **Obligations** tab of the contract record.

The following workflow explains the obligation extraction process.

1. As a Contract Admin with the AI role, activate the contract obligation extraction skill in the AI Admin Hub console.

   For more information, see Configure the manage contract repository agentic workflow for Software Asset Management.

2. Navigate to *Software Asset Workspace* > **License operations** > **Contracts** > **Software contracts** and select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Save the contract record.
4. Select the **Initiate contract extraction** button and upload a signed contract file.
5. After the obligation extraction is complete, the Contract Manager with the AI role receives a notification indicating that obligations are ready for review.
6. The Contract Manager reviews the extracted obligations within the contract playbook. Each obligation can be accepted or rejected based on relevance.
7. Approved obligations are automatically added as obligation records in the **Obligations** tab of the contract record.
8. Obligation tasks are created.
   - For a recurring schedule, the obligation tasks are automatically created for the obligation record based on the defined schedule.
   - For an ad hoc schedule, the contract manager creates an obligation task from the **Obligation tasks** tab in the contract record.
9. The assigned user is notified when the obligation task is created.
10. The assigned user works on the obligation task and submits it for review.

    The state of the obligation task changes from Open to Awaiting approval.
11. The Obligation Fulfiller reviews the task and approves or rejects it.
    - If the obligation task is rejected, the state of the task changes to Open, and the assigned user continues to work on it.
    - If the obligation task is approved, the state of the task changes to Completed.

For more information, see Review AI-extracted obligations.

Conditions for initiating extraction from the contract file

When a software contract is created, the **Initiate contract extraction** button appears on the contract form when the following conditions are met:

- One of the following AI skills are activated on your ServiceNow instance:
  - Contract metadata extraction
  - Contract obligation extraction
- At least one of these two extraction skills hasn't yet been executed on the contract record.

> **Note:** If both contract metadata and obligation extraction skills have already been executed on the contract record, the **Initiate contract extraction** button doesn't appear on the contract form.

AI agents used in the manage contract repository agentic workflow

AI agents names and descriptions

Name	Description
Contract Repository AI agent	Uses various tools to perform the following: • Retrieves the contract repository details, such as contract vendor, contract model, contract document's attachment ID, and

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AI agents names and descriptions (continued)

Name	Description
	so on from a specific contract repository record. • Extracts metadata from signed contact documents based on the applicable use case in the contract metadata extraction skill. • Extracts obligations from signed contact documents based on the applicable use case in the contract obligation extraction skill. • Calculates the average lead time for similar contracts.

Configure the manage contract repository agentic workflow for Software Asset Management

Install the ServiceNow Otto for Contract Management Pro plugin (sn_cm_gen_ai) and activate the generative AI skills to use the manage contract repository agentic workflow.

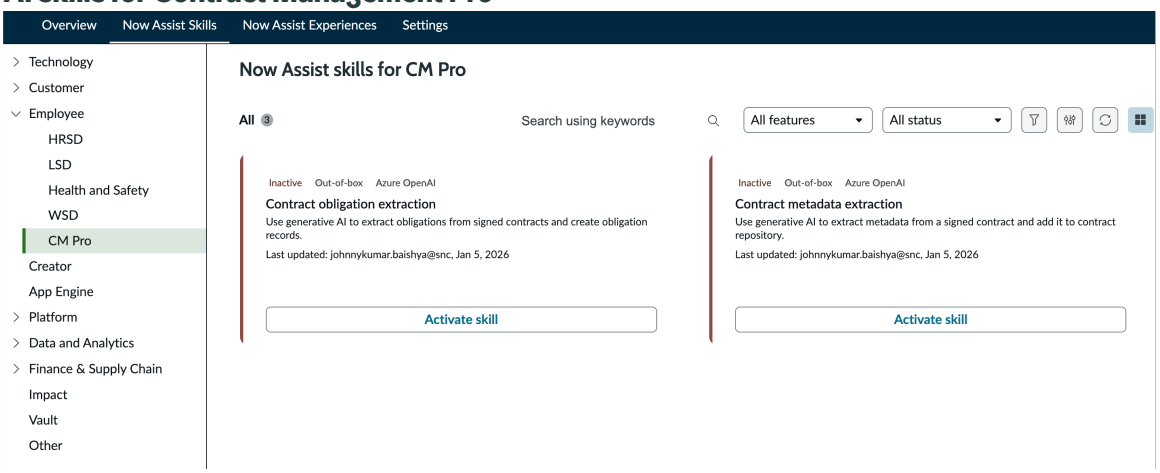
Before you begin

Role required: sn_cm_gen_ai.ai_contract_admin

Procedure

1. Install the ServiceNow Otto for Contract Management Pro plugin (sn_cm_gen_ai).
   For information about the plugin installation process, see Install plugins for ServiceNow Otto.
2. Navigate to **All** > **Admin Hub** > **Skills**.
3. Access the **AI Skills** tab of the AI Admin Hub console.
4. Navigate to **Employee** > **CM Pro**.
5. Select the **Activate skill** on the skill that you want to activate.

AI skills for Contract Management Pro



6. In the skill guided setup, configure the use cases and other mappings for the Contract obligation extraction and Contract metadata extraction skills.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information on configuring contract metadata extraction skill, see Configuring contract metadata extraction.

Note: For the Contract metadata extraction skill, complete the creation of use case, mapping use case, and enable notifications setup.

For more information on configuring Contract obligation extraction skill, see Configuring contract obligation extraction.

Note: When adding a new use case mapping record for the contract metadata extraction and contract obligation extraction skills, clear the **Contracts created from contract request** check box.

7. In the Define access page, select **Save and continue**.
8. In the Review and activate page, select **Activate**.

Result
When a software contract record is created, the **Initiate contract extraction** button is displayed on the contract form.

What to do next
Initiate metadata and obligation extraction from a signed contract in the Software Asset Workspace

Initiate metadata and obligation extraction from a signed contract in the Software Asset Workspace

Reduce manual effort by leveraging the Manage contract repository agentic workflow to extract key metadata and obligations from an uploaded signed contract, and calculate the contract reminder date.

Before you begin
Role required: sn_cm_gen_ai.ai_contract_fulfiller, sam_admin/sam_user, sn_cm_gen_ai.ai_contract_config, and now_assist_panel_user

About this task
Use the Manage contract repository agentic workflow to extract metadata and key contractual obligations from signed contracts. After extraction, the information is mapped to the appropriate fields in the software contract record. Review the accuracy of the extracted information and make necessary corrections to the extracted field values as required.

Procedure
1. Navigate to *Software Asset Workspace* > **License operations** > **Contracts** > **Software contracts**.
2. Select **New**.
3. On the Create New Contract form, fill in the required **Contract model** and **Contract number** field values.
   For a description of the field values, see Create a contract.
4. Select **Save**.
   After saving the software contract, the **Initiate contract extraction** button is displayed.
5. Select the Attachments icon  .

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. In the Attachments section, select **Select Files**.
7. Select the signed contract file.
8. In the Upload a file dialog box, select **Upload**.
   The uploaded file is displayed in the Attachments section.
9. Select **Initiate contract extraction** and select one of these options in the confirmation message:
   - To mark your confirmation and proceed with metadata extraction from signed contract, select **OK**.
   - To dismiss the metadata extraction from signed contract, select **Cancel**.

   After you confirm and proceed with metadata extraction, a confirmation message appears indicating metadata extraction initiated for the signed contract.
   After metadata extraction is completed, a confirmation message appears on the contract form and **Playbook** tab is displayed.

Result
After metadata extraction is completed, a confirmation message appears on the contract form and **Playbook** tab is displayed.

What to do next
Review the extracted metadata, contract reminder date, and obligations record.

Related topics
Review AI-extracted metadata and contract reminder date in the Software Asset Workspace

Review AI-extracted obligations Software Asset Workspace

Create a contract

Review AI-extracted metadata and contract reminder date in the Software Asset Workspace

Use the contract playbook to review and update the AI-extracted metadata and contract reminder date.

Before you begin
Role required: sn_cm_gen_ai.ai_contract_fulfiller, sam_admin/sam_user, sn_cm_gen_ai.ai_contract_config, and now_assist_panel_user

About this task
The Manage contract repository agentic workflow uses AI agents to extract key metadata from signed contracts and calculate contract reminder date. The metadata is extracted based on the applicable use case in the Contract metadata extraction skill. After the extraction process is complete, a message appears on the contract record and an email notification is sent with a link to review the extracted metadata. Once you have reviewed and submitted the extracted metadata, the contract reminder date is calculated. The reminder date is calculated based on the contract end date, auto-renewal clause, and notice period for contract renewal or termination.

To receive notifications when AI agents complete metadata extraction, verify that notifications are enabled by the administrator. For more information, see Enable notifications for AI extracted metadata and obligations.

Procedure
1. Navigate to *Software Asset Workspace* > **License operations** > **Contracts** > **Software contracts**.
2. Open a Contract record for which you want to review the extracted metadata.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select the **Playbook** tab.
4. In the Extracted metadata section, select **Review metadata**.
   The uploaded signed contract document and extracted fields are displayed on the **Record** tab. In the Document Q&A section, review all extracted information to verify that it's accurate.
5. Enter the value in the extracted fields that are empty.
6. **Optional:** Update the extracted information for the fields with incorrect information.
   a. Next to the appropriate field, select the Edit icon  .
   b. Make your updates as needed.
   c. Save your changes.
7. Select **Submit** and select one of these options in the confirmation message:
   - To mark your confirmation and proceed with contract metadata extraction, select **Confirm and Submit**.
   - To verify the extracted field values, select **Review**, and then select **Submit** to proceed with contract metadata extraction.

   After you confirm and submit the reviewed fields, a confirmation message appears for successful submission of the reviewed contract metadata. In the **Playbook** tab, in the Extracted metadata section, the status for metadata extraction is displayed as Complete. On the **Details** tab, the extracted field value from the signed contract document is populated.
8. **Optional:** Select the **Details** tab and review the field values extracted and populated on the contract form.
9. Select the **Playbook** tab.
   If the contract end date is available, the playbook opens on the **Review contract reminders** step, where you can review the AI calculated reminder date.
10. **Optional:** In the **Reminder date** field, modify the date if needed.
11. Select **Mark as complete**.
    The Contract reminder recipients page opens, displaying the list of users who are already configured as recipients for the contract reminder.
12. Configure the recipient list.
    - To add a user, select **Add** and then enter the user name in the Add recipients window.
    - To remove a user, select the check box corresponding to the user name and then select remove.

    Note: You must add at least one user as a recipient.
13. Select **Mark as complete**.

Result

- The extracted and reviewed metadata is added to the mapped fields in the software contract.
- The contract reminder date is saved, and the configured recipient receives a notification on the specified date to remind them of upcoming contract renewal or termination actions.

Review AI-extracted obligations Software Asset Workspace

Use the contract playbook to review, edit, approve, or reject obligations automatically extracted from contract documents. Approved obligations are added as obligations records in the **Obligations** tab of the contract repository.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: admin

About this task
The manage contract repository agentic workflow uses AI agents to extract key contractual obligations from signed contracts. The obligations are extracted based on the applicable use case in the contract obligation extraction skill. After obligation extraction is complete, a message appears on the contract record and an email notification is sent with a link to review the extracted obligations. The playbook provides a step-by-step interface where you can review each obligation, make necessary edits, and decide whether to approve or reject it. Approved obligations are added as actionable records in the **Obligations** tab in the License operations view.

Procedure
1. Navigate to *Software Asset Workspace* > **License operations** > **Contracts** > **Software contracts**.
2. Open a Contract record for which you want to review the extracted obligation record.
3. Select the **Playbook** tab.
   The playbook opens, displaying a step-by-step interface to review the extracted obligations.
4. In the playbook, under the AI extracted obligations section, navigate to the **Review obligations** step.
5. Select **Review**.
   The extracted obligations are displayed on a new tab.
6. Select an obligation to review the obligation details.
   - The **Details** tab displays the extracted obligation details. Use this tab to edit, approve, or reject the obligation.
   - The **Activity** tab displays a log of key attributes identified during the extraction process. Use this tab to review how the AI agent detected and populated the obligation, including the original text snippets and metadata extracted from the contract. The **Activity** tab helps you validate the extraction accuracy and provides transparency into the decision-making process for each obligation.
7. On the **Details** tab, perform the required action.
   - Edit the obligation details as needed.

     Note: Complete all required fields before saving the changes or approving the obligation.

     For a description of the field values, see Obligation form.
   - To save the changes, select **Save**.
   - To approve the extracted obligation and add it as a record in the contract repository, select **Approve**.
   - To reject the extracted obligation, select **Reject**.

     After an obligation is rejected, it's deactivated and can't be reactivated again. To add an obligation later, you must create an obligation record manually. For more information, see Create an obligation record in the Software Asset Workspace.
8. Repeat step 7 for all the extracted obligations.
9. Select the **Playbook** tab.
10. Select **Mark as completed**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

Approved obligations are available as records in the **Obligations** tab of the contract repository. Rejected obligations are deactivated and excluded from further processing.

If the schedule of the obligation is recurring, the obligation tasks are automatically created based on the interval specified in the **Repeats** field.

If the schedule of the obligation is adhoc, you must create obligation tasks manually. For more information, see Create an obligation record in the Software Asset Workspace.

Manage obligation tasks in the Software Asset Workspace

Create obligation records to define specific instructions and obligation task types required to fulfill the contract obligation in the Software Asset Workspace.

Obligation tasks are created to track and complete the activities specified in a contract, such as submitting an IT asset invoice every month.

An obligation record can have the following types of obligation tasks:

Ad hoc obligation task

The obligation task may be required only once or at irregular intervals to fulfill the contract obligations.

Recurring obligation task

The obligation task is required at regular intervals to fulfill the contract obligations. Recurring obligation tasks are automatically created based on the defined schedule.

Create an obligation record in the Software Asset Workspace

Create obligation records for signed contracts in Software Asset Workspace to fulfill the responsibilities specified in the contract through obligation tasks.

Before you begin

The contract record must be in the **Activate** state.

Role required: sn_cm_obligation.obligation_fulfiller

About this task

Recurring obligation tasks are automatically created from the obligation record. You can also add ad hoc obligation tasks that are performed only once or at irregular intervals. For more information about creating adhoc obligation task, see Create an ad hoc obligation task in Software Asset Workspace.

Procedure

1. Navigate to **Workspaces** > *Software Asset Workspace* > **License operations**.
2. Select **Software contracts**.
3. Select the active contract record.
4. Select the **Obligations** tab.
5. Select **New**.
6. On the form, fill in the fields.
   For a description of the field values, see Obligation form .
7. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- An obligation record is created for the contract and listed in the **Obligations** tab.
- The obligation record is saved in the Obligations [sn_cm_obligation_obligation] table.

What to do next

View the obligation record by navigating to any of the following paths:

- Navigate to the **Obligations** tab within the software contract record.
- Navigate to **Software Asset Workspace** > **License operations** > **Contracts** > **Obligations**.

Related topics

Manage obligation tasks in the Software Asset Workspace

Use Software Asset Management with Contract Management Pro

Create an ad hoc obligation task in Software Asset Workspace

Create an ad hoc obligation task in Software Asset Workspace

Create an obligation task required only once or at irregular intervals to track and fulfill an obligation specified in a contract.

Before you begin

Role required: sn_cm_obligation.obligation_fulfiller

Procedure

1. Navigate to **Workspaces** > *Software Asset Workspace* > **License operations**.
2. Open an active obligation record either from the **Obligations** tab within the contract record or from the **Obligations** view.

Method	Steps
From the contract record	**a.** Navigate to **Workspaces** > *Software Asset Workspace* > **License operations** > **Software contracts**. **b.** Select an active contract record. **c.** Select the **Obligations** tab. **d.** Select an active obligation record.
From the Obligations view	**a.** Navigate to **Workspaces** > *Software Asset Workspace* > **License operations** > **Obligations**. **b.** Select an active obligations record.

3. Select the **Obligation tasks** tab.
4. Select **New**.
5. On the New obligation task form, completed the following steps:
   a. In the **Assigned to** field, update the assigned user.
   b. In the **Due date** field, select the due date for the obligation task completion.
   c. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- An ad hoc obligation task record is created for the obligation and listed in the **Obligations tasks** tab.
- The assigned user who fulfills the obligation is notified through email.
- The obligation task record is saved in the Obligation Tasks [sn_cm_obligation_obligation_task] table.

What to do next

View the obligation record by navigating to one of the following paths:

- Navigate to the **Obligations tasks** tab within the obligation record.
- Navigate to **Software Asset Workspace** > **License operations** > **Contracts** > **Obligation tasks**.

Using Software Asset Management classic

Use the classic Software Asset Management framework to manage your licenses, compliance, and optimization.

Create entitlements in Software Asset Management classic

Create entitlements in the Software Asset Management application classic to record your license details and allocate purchased software rights to users or devices.

Before you begin

Role required: sam_user

About this task

These instructions are for manually creating software entitlements or maintenance entitlements one at a time. If you already have software entitlements recorded in a spreadsheet, you can import them.

To automate the process of creating a software entitlement, specify a publisher part number in the software entitlement form. Based on the publisher part number, the software model, metric group, agreement type, and software lifecycle data (if it exists) automatically appears in the form.

To better manage your existing entitlements, you can edit certain fields in entitlements. You can edit fields such as **Purchased rights**, **Software model**, **License type**, **Number of packs**, and **Publisher part number**. Entitlements that have related entitlements, upgrade history, entitlement history, or upgraded entitlement are not editable.

Note: Microsoft reserve entitlements and source entitlements are not editable.

If you installed SaaS License Management, a software model is generated automatically after you create an integration profile. Create an entitlement for the software model to track software used against software owned. For more information about tracking SaaS licenses and usage, see Viewing your SaaS and SSO subscriptions.

If you installed the SAP publisher pack, see Record software rights for SAP.

If you installed the Citrix publisher pack, see Record software rights for Citrix

Procedure

1. Navigate to **All** > **Software Asset** > **Licensing** > **Software Entitlements**.
2. Select **New**.
3. On the form, fill in the fields to record your license information.
   For detailed descriptions of the fields, see Software entitlement fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Right-click the form header and select **Save**.
   Saving the form instead of submitting keeps you on the entitlement record so you can perform additional configuration.
5. To specify users and devices that have software rights allocated to them, select the **User Allocations** or **Device Allocations** section.
   The **Device Allocations** section is not visible for the IBM Resource Value Unit (RVU) license metric. The Resource Value Unit (RVU) license metric is licensed at the product level and so rights are not used by individual devices. When you upgrade from a prior release, that had device allocations, to the Brazil release, the existing device relocations are removed.
6. To track your software downgrade rights, select the Downgrade Rights related list and specify the version.
   Creating a new record allows you to set an entitlement to previous versions of software. For example, the purchase of Microsoft Office Professional Plus 2016 rights entitles you to Microsoft Office Professional Plus 2013 too).

   For more information, see Downgrade Rights.
7. To track the cost of your software over its lifecycle, configure expense lines.
8. To manage license keys, select the License Keys related list and specify which licenses keys are allocated to entitlements.
9. To view the history of all maintenance entitlements that you have purchased, select the Entitlement History related list.
   For example, if you purchased two maintenance entitlements, M1 (which is now retired) and M2 (currently in use), the Entitlement History related link displays both M1 and M2.
10. To view the history of the newly upgraded software model related to your entitlement and the previous software model, select the Upgrade History related list.
11. Select **Update**.
    The entitlement is created and added to the entitlement list view.

Related topics

Software entitlement fields

Software models and software entitlements

Software license metrics

Create maintenance entitlements in Software Asset Management classic

Define license details, for all publishers other than Microsoft, to manage all your software license maintenance needs such as start and end dates of your contracts and software upgrades.

Before you begin

Role required: sam_admin

Procedure

1. Navigate to **All** > **Software Asset** > **Licensing** > **Software Entitlements**.
2. Click **New**.
3. On the Software Entitlement form, fill in the mandatory fields and select **Maintenance** in the **License type** field.

   For a detailed description of all the fields, refer to Software entitlement fields.

   If the **Next Version** field is populated in the software model that the maintenance entitlement is associated with and the metric group selected in the maintenance entitlement is **Common**,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

then the maintenance entitlement is updated with the next version of the software model. Next version is applicable only for the **Common** metric group.

4. Right-click the form header and select **Save**.

   Note: If you purchase a perpetual entitlement and associate only some of the rights of that entitlement with a maintenance entitlement, your perpetual entitlement is automatically split into two entitlements. For example, you purchased a perpetual entitlement with 50 active rights (E1). You associate 20 of these rights with 20 rights of a maintenance entitlement. Your E1 perpetual entitlement is now automatically split into two entitlements: one perpetual entitlement (E1) with 20 active rights (and 50 purchase rights) associated with 20 rights of the maintenance entitlement (M1) and another perpetual entitlement (E2) with 30 active rights without any maintenance association and no purchased rights.

5. Perform additional configurations on your new maintenance entitlement record.

   For a detailed description, see Software entitlement fields.

   You can't add user or device allocations for maintenance entitlements.

   a. Enter information pertaining to finance such as the vendor from which the asset was purchased, the invoice number, in the **Financial** tab.

   b. Enter information relating to contracts such as the lease contracts, the expiration date of the warranty in the **Contracts** tab.

   c. Link related perpetual entitlements to your maintenance entitlement from the **Related Entitlements** tab.

      i. Select the **Related Entitlements** tab.

      ii. In the **Related Entitlement** field of the Related Entitlements list, double-click **Insert a new row...**.

      iii. When prompted, search for and select the related perpetual entitlement that you want to link and then click the Save ( ) icon.

      iv. Double-click the corresponding **Active rights** field.

      v. When prompted, enter the number of rights that you want to grant to the related perpetual entitlement and then click the Save ( ) icon.

      vi. Click **Save** on the Software Entitlement form header.

      To remove the relationship between the perpetual and maintenance entitlement, remove the entitlement from the Related Entitlements list.

      If the entitlement has split and you've deleted the maintenance entitlement, the perpetual entitlement is not removed.

   d. View the downgrade rights for the software model associated with the maintenance entitlement in the **Downgrade Rights** related list.

   e. To manage license keys, and specify which licenses keys are allocated to entitlements, click the **License Keys** related list

   f. To track the cost of your software over its lifecycle, click the **Expense Lines** related list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

g. To view the history of all maintenance entitlements that you have purchased, click the**Entitlement History** related list.
For example, if you purchased two maintenance entitlements, M1 (which is now retired) and M2 (currently in use), the Entitlement History related link displays both M1 and M2.

h. To view the history of the newly upgraded software model related to your entitlement and the previous software model, click the **Upgrade History** related list.

6. Click **Update**.

Create entitlements for Microsoft Software Assurance in Software Asset Management classic

Define license details for Microsoft Software Assurance (SA) to manage your contracts start and end dates, software upgrades, and related software entitlements.

Before you begin
Role required: sam_user or sam_admin

Procedure

1. Navigate to **All** > **Software Asset** > **Licensing** > **Software Entitlements**.
2. Select **New**.
3. On the Software Entitlement form, fill in the details about the software publisher rights that you have purchased and select **Maintenance** in the **License type** field.

   Note: Make sure that you enter the number of rights to be granted for the SA entitlement in the **Active rights** field. You can't add user or device allocations for SA entitlements.

   For a detailed description of the fields related to all entitlements, see Create entitlements in Software Asset Management classic.

4. Right-click the form header and select **Save**.
   An entitlement appears in the Software Entitlement list.

   Note: If you purchase a perpetual entitlement and associate only some of the rights of that entitlement with a SA entitlement, your perpetual entitlement is automatically split into two entitlements. For example, you purchased a perpetual entitlement with 50 active rights (E1). You associate 20 of these rights with 20 rights of a SA entitlement. Your E1 perpetual entitlement is now automatically split into two entitlements: one perpetual entitlement (E1) with 20 active rights (and 50 purchase rights) associated with 20 rights of the SA entitlement (M1) and another perpetual entitlement (E2) with 30 active rights without any SA association and no purchased rights.

5. To perform additional configuration, select your new software entitlement record from the Software Entitlements list.

   a. To link related perpetual and SA entitlements, use the following steps:

      i. On the Software Entitlement form, select the **Related Entitlements** tab.

      ii. In the **Related Entitlement** field of the Related Entitlements list, double-click **Insert a new row...**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

iii. When prompted, search for and select the related perpetual or SA entitlement that you want to link and then select the Save icon.

iv. Double-click the corresponding **Active rights** field.

v. When prompted, enter the number of rights that you want to grant to the related perpetual or SA entitlement and then select the Save icon.

vi. Select **Save** on the Software Entitlement form header.

To remove the relationship between the perpetual and SA entitlement, remove the entitlement from the Related Entitlements list.

If you delete either the perpetual or SA entitlement that is linked, the other entitlement isn't deleted.

If the entitlement has split and you have deleted the SA entitlement, the perpetual entitlement is not removed.

b. To link your software to a newer version as part of your maintenance contract, select the Upgraded Entitlements related list.

Note: This related list is only available if you selected **Step-up** as the entitlement license type.

If the **Next Version** field is populated on the software model, entitlements with active SA are updated to the new version of the software model.

After you have linked your related entitlements, if there aren't enough SA rights to cover the perpetual entitlement rights, an error message displays.

c. To view all previously related entitlements that are linked, select the Entitlement History related list.

Note: Validation is run against the active rights of all related entitlements automatically. If there's an error with the calculation, a message with additional information on how to resolve the problem is displayed.

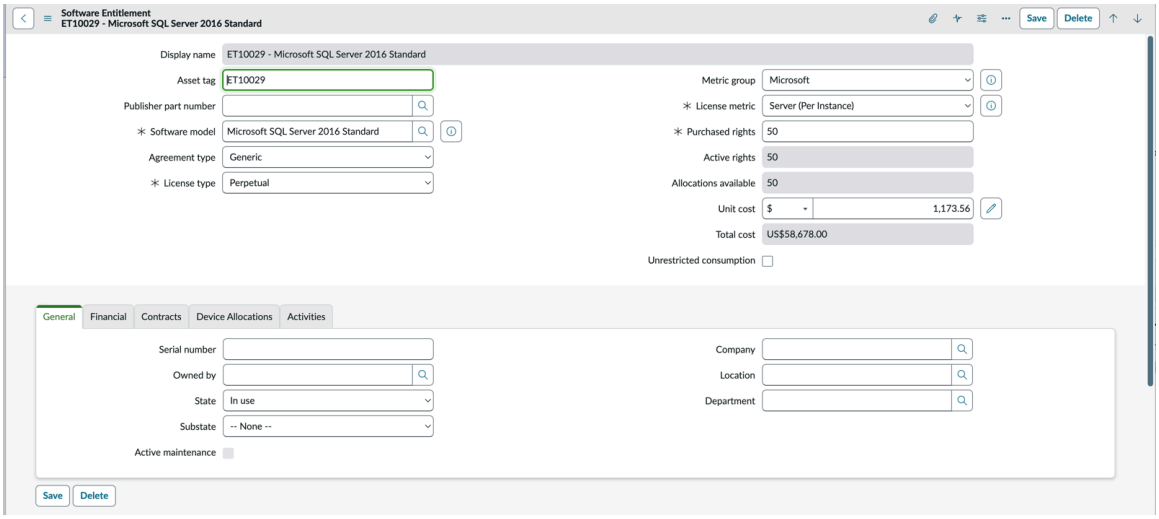
6. Select **Update**.

Result
After you have created an entitlement, you can begin viewing license usage.

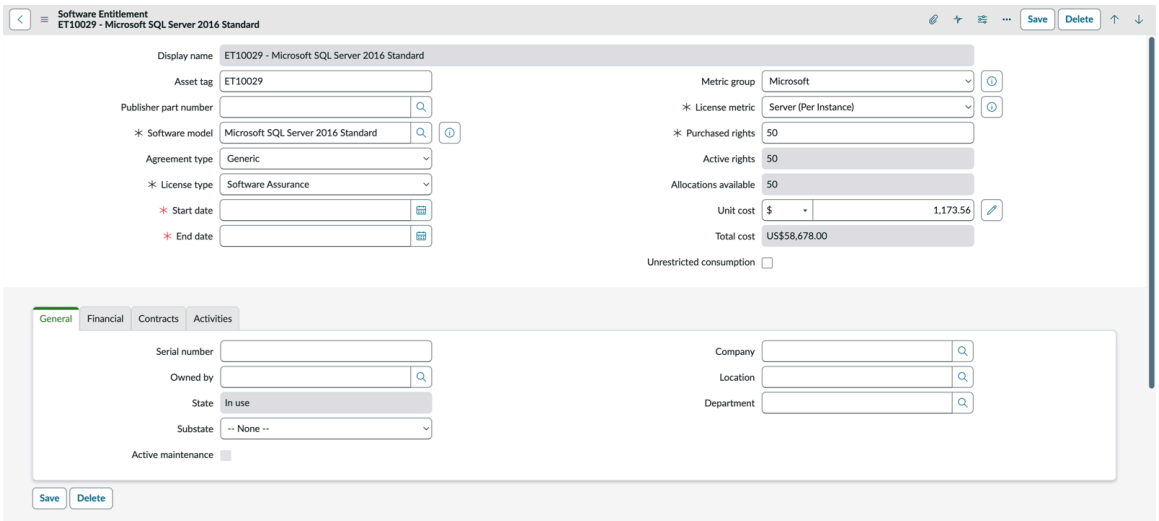
Example: Record software rights for Microsoft Software Assurance

You have purchased 50 rights of Microsoft SQL Server 2016.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



You have also purchased SA for your Microsoft SQL Server 2016 licenses.



To accurately track your licenses, associate your perpetual and SA entitlements.

While you're under active maintenance, Microsoft releases SQL Server 2016 datacenter. Step up from your current version to the new release by creating an entitlement for your upgraded software and link the related entitlements.

Import bulk entitlements in Software Asset Management classic

You can import multiple entitlements together using a Microsoft Excel spreadsheet in Software Asset Management classic.

Before you begin

Role required: sam_user or sam_admin

About this task

The entitlement import records are stored in the Entitlement import [samp_bulk_import] table.

Procedure

1. Navigate to **All** > **Software Asset** > **Entitlement Import**.
2. In the Entitlement imports page, select **New**.
   A new entitlement import record opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. In the Entitlement import page, click **Download template** to download a spreadsheet template(.xlsx).

   You can add software entitlement fields to the template to include additional fields in your import. Add each field as a new column in the template. The column name must match the field label exactly. You can include base system software entitlement fields as well as your custom software entitlement fields. To learn how to create a custom field, see Add and customize a field in a table.

   By default, the **Unit cost** column in the spreadsheet takes into account the currency that your system is set to. However you can manually change the currency and the Software Asset Management application will honor the currency that you specify. To specify a currency, enter the currency code followed by a semicolon and the cost. For example, `EUR;200`. Valid currency codes are the ones listed in the Currency [fx_currency] table and have the **Active** column set to true.

4. Enter the entitlement details in the template and select **Click to add** to select and upload the spreadsheet.
   Once the file is uploaded, the name of the file appears and the **Description** field is automatically populated.
5. Select **Import**.
   A confirmation message appears informing you that the import of entitlements is in progress. Once the process is completed, the fields on the page show the number of rows that were processed, successful, and with errors. Once you attach and import a spreadsheet, an import record is created that retains the history of the upload for you to view later.
6. Select the link on the confirmation message to view the status of the import record.
   The Entitlement Imports page appears listing all the entitlement import records.
7. Select the entitlement import record to display the Entitlement Import page.
   The Entitlement Import page contains two tabs:
   - **Entitlements**: lists all the entitlements that got successfully created.
   - **Relate entitlements**: lists entitlements, such as maintenance entitlements, that are in the build state and can be linked to the base entitlements.
8. If any errors occur, select **Review import errors** to open the Entitlement Import Errors page. Only records whose error status is **Needs review** are listed by default. You may need to reload the page to view **Review import errors**.
9. Select an import error record to view its errors.
   The Entitlement Import Errors page appears. For a detailed description of the entitlement import error fields, see Entitlement import error fields.
10. Correct the errors and then select **Import**.
    The entitlement is successfully created. For more information on resolving errors, see Entitlement import error actions.

Create software models in Software Asset Management classic

Create a software model to add product details that are used to connect software rights you purchased with software installations discovered on your system.

Before you begin

Role required: sam_user or model_manager

About this task

You can manually create a software model. However, you can leverage the Software Asset Management Content Service Library to automate the creation of software models through their relationship to software entitlements. While creating or importing a software entitlement,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

specifying a publisher part number automatically creates a software model (if needed) or links to an existing software model. You need to manually create a software model if a publisher part number is not available, a publisher part number does not exist in the Content Service Library, or if you are creating a software model for a custom product.

Note: If you have the model_manager role, you can navigate to **Product Catalog** > **Product Models** > **Software Models** but cannot administer all aspects of software models.

View and track life cycle information of your product versions (licensable, minor or build) via product life cycles. Product life cycles are associated to software models. Product life cycles are based on attributes such as publisher, product, edition, edition condition, version, and version condition. The life cycle information is maintained in the Product Lifecycle [sam_sw_product_lifecycle] and Custom Product Lifecycle [sam_custom_sw_product_lifecycle] tables.

You can view a detailed product life cycle report in the Software Asset Analytics dashboard and drill-down to the software installations. You can also manually create product life cycles and view product life cycles associated to a software model in the Software Product Lifecycle related list in the Software Model form layout.

Note: Duplicate product life cycles can be created but in different domains.

You can view the life cycles for all the versions of the product on the software model form layout by clicking the **Show Product Lifecycles for all Versions** related link.

If you've installed the SAP publisher pack, see Record publisher details for SAP.

Procedure

1. Navigate to **Software Asset** > **Licensing** > **Software Models**.
2. Select **New**.
3. On the Software Model form, fill in the details about the software publisher.
4. Right-click the form header and select **Save**.
5. Specify whether your software publisher is part of a suite.
   - To designate your software model as a suite parent, select the Suite Parents related list and add all software included with the suite.
   - To designate your software model as a suite component, select the Suite Components related list and add the parent suite.

   Note: If you've added a discovery map to your product details, predefined suites are used and suite components are created automatically for known suite parent.

6. To enable self-service capabilities for the software that is associated with your software model, publish the software model to your service catalog.

   a. Select the **Publish to Software Catalog** related link.
   The Publish <*software-model*> to Software Catalog dialog box opens.

   b. On the dialog box, set the **Category** field to **Software**.

   c. Select **OK**.

7. To see discovery maps that have the match the software publisher and product fields of the software model, select the **Show Matching Discovery Models** related link.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. To view all the product lifecycles associated with your software model, select the Software Product Lifecycles.
   Select **New** to create a custom product life-cycle.
9. To set the attribute value, select the Metric Attributes related list and complete the form.
   When you add an attribute value, entitlements with this publisher information associated with them automatically have the **Metric Group** field populated. Based on the metric group, only license metrics related to the publisher are available.
10. To associate your software model with a vendor, select the Vendor Catalog Item related list and complete the form.
11. To specify the number of devices or users that are accessing the software, select the Client Access related list and complete the form.
12. To create a new record for the software downgrade rights, select the Downgrade Rights related list and complete the form.

    Note: If your software model has a discovery map associated with it and the discovery map has downgrade rights, the downgrade rights are populated automatically. Downgraded versions of the software appear in a hierarchical list. For more information, see Downgrade Rights.

13. Select **Update**.

Related topics

Supported software publisher licenses

Software models and software entitlements

Software model fields

View normalization suggestions in Software Asset Management classic

View normalization suggestion records that are created for discovery models. You can accept or reject these suggestions.

Before you begin

Role required:

- sam_admin: accepts or rejects the normalization suggestions.
- sam_user: views normalization suggestions.

The records are contained in the Normalization Suggestions [samp_normalization_suggestions] table.

Procedure

1. Navigate to **All** > **Software Asset** > **Discovery** > **Normalization Suggestions** For details on the normalization suggestion fields, see Normalization suggestions for discovery models.

   Note: Suggested field values that differ from actual field values are indicated by a blue dot.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Select **Accept** to make the suggested changes to the discovery model, or click **Reject** to keep the existing settings.

> **Note:** Only the sam_admin role can accept or reject the normalization suggestions. For more details on accepting or rejecting suggestions, see Normalization suggestions for discovery models.

View a software job result

You can view the results of Software Asset Management jobs that have run to verify completion.

Before you begin

Role required: sam_admin

About this task

Job results include:

- Discovery Model Normalization
- Identify Restricted Installs
- Identify New Reclamation Candidates
- Software Usage Import
- Update Existing Reclamation Candidates
- Software Asset Management Content Service Upload/Download

All Software Asset Management scheduled jobs are listed in the **System Definition** > **Scheduled Jobs** navigation area. Software Asset Management scheduled job names begin with the product name (SAM).

> **Note:** The default date, time, and order of Software Asset Management scheduled jobs are configured for optimal performance. Changing a scheduled job from the default run setting may not be optimal for performance or data availability.

Procedure

1. Navigate to **Software Asset** > **Administration** > **Job Results**.
2. Open a record to view the job results.

Software Asset Job Result form

Field	Description
Number	Number of the job result that is generated when the job is run.
Name	Name of the job.
Status	Status of the job.
Created	Date and time job was created.
Updated	Date and time job was updated.

Manually normalize a software discovery model in Software Asset Management classic

You can edit a software discovery model to manually normalize discovered software that has not been fully normalized (partially normalized, publisher normalized, or match not found) on the Software Discovery Models form so that it can be reconciled.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sam_user

About this task
If the information automatically added to the software discovery model is incomplete, you can add the missing fields to manually normalize the software discovery model.

Procedure
1. Navigate to **All** > **Software Asset** > **Discovery** > **Discovery models** and open a discovery model record that has a normalization status of Partially Normalized, Publisher Normalized, or Match Not Found.
2. Fill in the **Publisher**, **Product**, and **Version** fields, as appropriate.
   You can create a custom product from the Product lookup list, if desired.
3. Select **Save**.
   The normalization status is set to Manually Normalized.
4. **Optional:** To revert normalization, select **Revert Normalization**.

   Note: Discovery models with a status of Normalized, Partially Normalized, or Publisher Normalized revert to the status of Match Not Found. Discovery models with a status of Manually Normalized and discovery models that have been normalized using pattern rules cannot be reverted.

   Fields are reset to their original values, and any rules associated with the software discovery model are deactivated.

Manually override edition value in Software Asset Management classic

When the edition of a software install is not automatically discovered, you can specify the edition on the Software Installation form with the correct value (if known) so the software can be successfully reconciled.

Before you begin
Role required: sam_admin

About this task
For reconciliation to run successfully, the publisher, product, version, and edition fields of the software must be set. When the edition is not discovered automatically (edition value is not included as part of the **Display name** field) but you know the edition, you can manually set it to the correct value (`Enterprise`, for example).

Once the edition value is set, the discovery model for the software install is automatically reset. If the appropriate discovery model does not exist, a new one is created.

Note: Not all software products consist of an edition. Of the software products consisting of an edition, not all edition values are automatically discoverable.

Procedure
1. Navigate to **All** > **Software Asset** > **Discovery** > **Software Installations** and open the software installation record for which to set the edition value.
2. Fill in the **Edition override** field, as appropriate.

   Note: The **Edition override** field is a free-form field (no lookup list) therefore, since this field is used as a key, the value entered must be exact.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select **Update**.
   The software installation is associated to different discovery model containing the edition value as part of the primary key. If the appropriate discovery model does not exist, a new one is created.

Discovered engineering licenses in Software Asset Management classic

View a list of all the discovered and normalized software for your engineering applications.

Navigate to **Software Asset** > **Discovery** > **Discovered Engineering Licenses**

You can view a list of all the normalized publishers and products for your engineering applications. Additional information such as the version, quantity of licenses, and the type of license is also displayed.

Software license usage

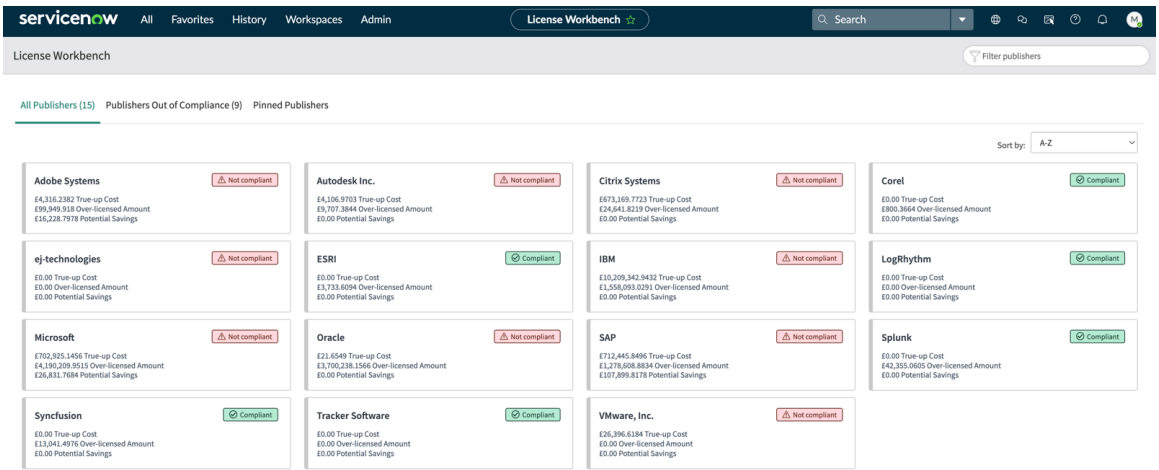
Review reconciliation results in a simplified workbench view.

The License Workbench lets you forecast the needs of your organization by trending the number of rights consumed against the number of active rights purchased. You can stay in compliance by purchasing additional rights before software consumption surpasses the number of rights owned.

Workbench features include:

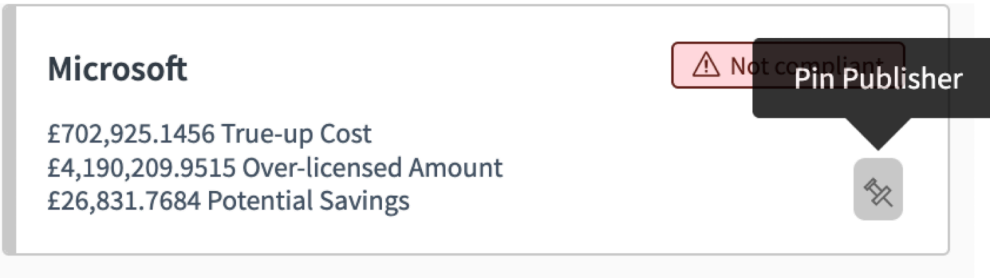
- Color-coded compliance banner
- Financial calculations on card
- Publisher pinning functionality (user specific, saved)
- Sort card functionality
- Active filtering
- Card drill down to Product Results list
- Keyboard control
- Group and subgroup reconciliation information, if applicable

License workbench



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Pinned publishers are listed in the **Pinned Publishers** tab. The list of pinned publishers is saved on a per-user



basis.

License Workbench tabs

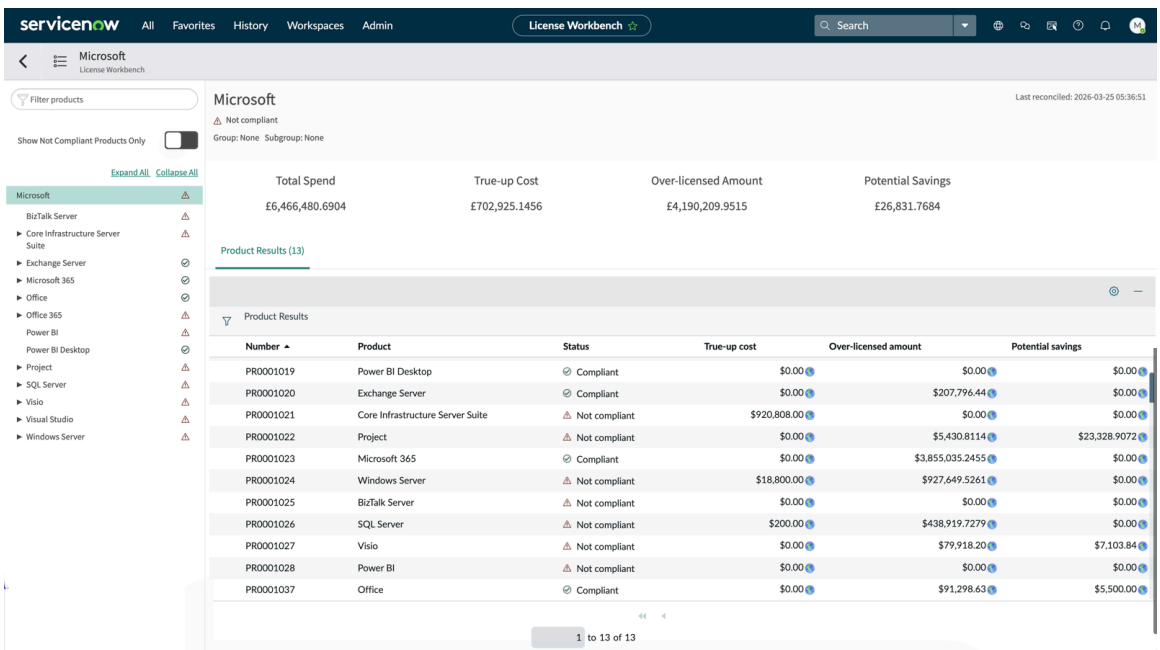
Tab	Description
All Publishers	List of all publishers.
Publishers Out of Compliance	List of all publishers where status is not compliant.
Pinned Publishers	User-specific saved list of publishers that have been grouped.

Publisher workbench navigation tree

Drill down on a specific publisher, product, software model, or license metric in the workbench navigation tree to view the calculation and compliance information from the latest reconciliation results.

The navigation tree features are:

- Filter products (active filtering, including collapsed items)
- Compliance toggle switch
- Expand and collapse tree links
- Software model compliance icons



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

By default, the navigation tree on the publisher license overview page is collapsed. When expanded, it's grouped by publisher.

Publisher: Product Results related lists:

- Software Model Results
- Licensed Installs
- Unlicensed Installs (SAP: Unlicensed Users or Unlicensed Engines)
- Unlicensed Subscriptions (Subscription-based software)
- Removal Candidates

Software Model Results related lists:

- License Metric Results
- Remediation Options: The **Rights Needed By** tab is not visible for the Resource Value Unit (RVU) IBM license metric. Rights are not used by individual devices, as the Resource Value Unit (RVU) license metric is licensed at the product level.

  Note: For more details on the remediation options, see View software model results.

- Licensed Installs
- Unlicensed Installs (SAP: Unlicensed Users)
- Unlicensed Subscriptions (Subscription-based software)
- Unlicensed Consumptions (Consumption-based software models)
- Unlicensed Options (Oracle only)
- Removal Candidates
- Purchase Orders (only when the Procurement (com.snc.procurement) plugin is active)

License Metric Results related list:

- Rights Used By: Not visible for the Resource Value Unit (RVU) IBM license metric. The Resource Value Unit (RVU) license metric is licensed at the product level; it is calculated based on the total consumption of the product in your enterprise.

  Note: Four additional fields are visible in the Rights Used By related list if you have cloud installations.

- Licensed Installs
- Installs Used (SAP: System Users)
- Downgrades/Upgrades
- Licensed Subscriptions
- Cloud Special Rights: This tab is available only if you have cloud installations on cloud platforms such as AWS or Azure. This tab is a subset of the Rights Used By tab and displays fields pertaining to cloud installations. For detailed descriptions on the Cloud Special Rights fields, refer to the Rights Used By tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report calculations

Report	Description
Publisher, product, software model	
Total Spend	Total cost of rights owned.
True-up Cost	Estimated cost of remediating unlicensed installations based on the lowest number of rights needed (rights needed multiplied by average price per right from entitlements). The lowest cost from Purchase Rights remediation options.
Over-licensed Amount	Estimated cost of rights not being used. The sum of the Over Licensed amount from the True-up value costs.
Potential Savings	Cost saved if removal candidates are reclaimed.
Agreement Type	Software license type.
License Metric results	
Display name	Name of the license metric that the software license is counted against when reconciliation runs.
Rights owned	Sum of all active rights from entitlements that share a license metric.
Rights used	Sum of rights that are used during reconciliation (allocated plus not allocated and installed).
Rights available	Sum of rights that are not used during reconciliation (rights owned minus rights used).
Legacy license **Note:** This field appears only if your environment has dedicated hosts on AWS or on Azure.	Indicates licenses purchased before 1 Oct 2019. **Note:** Microsoft has updated licensing rules for dedicated hosts based on the purchase date.
Over-licensed amount	Estimated cost of unused rights.
Right allocations	• Allocated in use • Not allocated in use • Allocated not in use • Not allocated • Allocations needed

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report calculations (continued)

Report	Description
	Note: For Microsoft Per Core and Microsoft Per Core with (CAL), you can have non-transferable rights. Non-transferable rights are any remaining rights from a core pack that cannot be used to license any additional devices.
Rights needed **Note:** This field is hidden by default. Select the personalize list icon () to modify the fields that appear in the License Metric Results.	Number of rights that are required to cover unlicensed installations.
Unlicensed installs **Note:** This field is hidden by default. Select the personalize list icon () to modify the fields that appear in the License Metric Results.	Number of unlicensed software installations that are not covered by any entitlements.
Unlicensed SAP users (SAP only) **Note:** This field is hidden by default. Select the personalize list icon () to modify the fields that appear in the License Metric Results.	Number of unlicensed SAP users that are not covered by any entitlements.
Unlicensed options (Oracle only) **Note:** This field is hidden by default. Select the personalize list icon () to modify the fields that appear in the License Metric Results.	Number of unlicensed Oracle database options that are not covered by any entitlements.
Unlicensed subscriptions **Note:** This field is hidden by default. Select the personalize list icon () to modify the fields that appear in the License Metric Results.	Number of unlicensed software subscriptions that are not covered by any entitlements.
True-up cost **Note:** This field is hidden by default. Select the personalize list icon () to modify the fields that appear in the License Metric Results.	Estimated cost of remediating unlicensed installations that are based on the lowest number of rights needed.
Potential savings	Estimated cost saved by reclaiming removal candidates.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report calculations (continued)

Report	Description
Note: This field is hidden by default. Select the personalize list icon (⚙) to modify the fields that appear in the License Metric Results.	
Downgrade rights **Note:** This field is hidden by default. Select the personalize list icon (⚙) to modify the fields that appear in the License Metric Results.	Previous software versions that you can license using software entitlements for the latest software version.

Rights Used By

Field	Description
Used by	User or device using the rights.
Rights used	Sum of rights used during reconciliation (allocated + not allocated and installed).
Cloud Provider	Name of the cloud provider. **Note:** This field appears only if you have cloud installations on AWS or Azure.
Dual Use Rights Applied	Indicates if the concurrent rights provided by Microsoft Azure that allows simultaneous usage of rights on-premise and on cloud is applied or not. **Note:** This field appears only if you have cloud installations on AWS or Azure.
Host Type	Type of host on the cloud: shared or dedicated. **Note:** This field appears only if you have cloud installations on AWS or Azure.
Edition Flexibility Applied	Indicates if the edition flexibility benefits provided by Microsoft Azure for Windows Server and SQL Server is applied or not. **Note:** For details on the edition flexibility benefits, refer to Licensing rules for BYOL and BYOS. This field appears only if you have cloud installations on AWS or Azure.
Allocated in use	Rights that are allocated and are used to license installations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Not allocated in use	Number of rights that are used to license installations, but not allocated. When this value is greater than 0, two remediation options (Create Allocations and Remove Unallocated Installs) are automatically created for each unique license metric in the software model that meets this requirement, except User CAL and Device CAL.
Allocated not in use	Rights that are allocated but are not being used to license any installations. **Note:** **Allocated not in use** reflects rights that are wasted because the user or device for which these rights have been allocated do not have the software installed. When this value is greater than 0, a Remove Allocations remediation option is automatically created for each unique license metric in the software model that meets this requirement.
Allocations needed	Number of allocations needed for compliance. Only used for Per Named User and Per Named Device license metrics.

Run software reconciliation in Software Asset Management classic

Reconciliation is run as a scheduled job (default is weekly), but you can also run reconciliation manually to reconcile software products in your environment on demand.

Before you begin
Role required: sam_admin

About this task
Reconciliation is run for products that have software entitlements or software installs. Grouping and subgrouping are supported so you can narrow the compliance results.

When running reconciliation manually, allow enough time for the process to complete. For faster results, narrow the scope by selecting specific publishers.

Note: The classic path requires the legacy SAM module. If the classic menu is not visible, use the reconciliation task in SAM Workspace reconciliation task instead.

Procedure

1. Navigate to **All** > **Software Asset** > **Reconciliation** > **Run Reconciliation** and select the publishers for which compliance should be calculated, or select all publishers.
2. To narrow results further, select **Group** and **Subgroup**, if desired.
   Available group and subgroup values include None, Country, Department, Company, Region, and Cost Center.
3. Select **Continue**.
   The reconciliation process may take an extended amount of time to complete. Once reconciliation is complete, the reconciliation results are shown.

View software model results

View compliance information for software model results from the Product Results list after reconciliation is run.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sam_user

About this task
You can view License Metric Results, Remediation Options, Licensed Installs, Unlicensed Installs, and Removal Candidates related lists for a software model result from a Product Result record. When the Procurement application (com.snc.procurement) is active, you can also create and view purchase orders directly from the Remediation Options form. More remediation options include automatically create and remove allocations, remove unallocated installs, and remove unlicensed installs.

For example, if the status of a product result shows that it isn't compliant, you can drill down on the product result to view software model details. These details can include the number of unlicensed installs and the true-up cost to become compliant. Further, you can drill down on the software model result to view the license metric result, which is based on the entitlements for the product.

License metric result information includes rights owned and rights used as well as the license allocation breakdown so you can determine your options to become compliant. The Remediation Options related list shows the number of rights needed and calculates the cost of those rights for you, based on the license metric.

You can use the dashboard field action icon on the Software Model Results form to view the Rights Owned vs Rights Used chart to forecast when additional licenses are needed.

Note: Software model results (SMRs) aren't generated for software models for Oracle Database options without associated software entitlements. However, you can set the system property *com.snc.samp.unlicensed_smr_creation* to **True** to create SMRs for these models even if there are no entitlements.

Procedure
1. Navigate to **All** > **Software Asset** > **Reconciliation** > **Historical Results** and select a reconciliation result.
2. On the Reconciliation Result form, select a Product Results record to view the product result details.
3. In the Software Model Results related list, open a record to view the software model result details.

Software Model Results form

Field	Description
Software model	Software model associated with the product. Drill down on the software model to see the software model result. The dashboard field action ( ) icon shows the Rights Owned vs Rights Used chart for the software model.
Product result	Unique product result number generated during the reconciliation process.
Group	Group specified on which to run reconciliation. Values include None, Country,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Department, Company, Region, and Cost Center.
Subgroup	Subgroup specified on which to run reconciliation. Values include None, Country, Department, Company, Region, and Cost Center.
Latest	Indicates whether this software model result is from the most recent reconciliation run.
Status	Status of the software model. ○ Compliant ○ Not Compliant
Agreement type	Agreement type is set on the software entitlement. ○ Common: Generic, Enterprise License Agreement (ELA) ○ IBM: Generic, Enterprise License Agreement (ELA), International Program License Agreement (IPLA), IBM Customer Agreement (ICA), Unlimited Level Agreement (ULA) ○ Microsoft: Generic, Enterprise License Agreement (ELA) ○ Oracle: Generic, Unlimited Level Agreement (ULA) ○ VMware: Generic, Enterprise License Agreement (ELA), Enterprise Purchasing Program (EPP), Volume Purchasing Program (VPP) **Note:** If the agreement type is Enterprise Level Agreement or Unlimited Level Agreement, the **Status** is Compliant even if there are unlicensed installations or unlicensed subscriptions.
Unlicensed installs	Number of unlicensed software installations that aren't covered by any entitlements.
True-up cost	Estimated cost of remediating unlicensed installations based on the lowest number of rights needed (rights needed * average price per right from entitlements). The lowest cost from Purchase Rights remediation options.
Over-licensed amount	Estimated cost of rights not being used. The sum of the Over Licensed amount from the True-up value costs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Potential savings	The cost that can be saved by acting on underutilized or incorrect consumption of licenses in related removal candidates.
License Metric Results	
Display name	Name of the license metric that the software license is counted against when reconciliation runs. Select the **Display name** to open the corresponding License Metric Results record, where you can view more in-depth information about the license metric result. See Software model results license metric results fields for more details.
Rights owned	Sum of all active rights from entitlements that share a license metric.
Rights used	Sum of rights used during reconciliation (allocated plus not allocated and installed).
Rights available	Sum of rights not used during reconciliation (rights owned minus rights used).
Over-licensed amount	Estimated cost of unused rights.
Legacy license	Indicates licenses purchased before 1 Oct 2019. This field appears only when the environment has dedicated hosts on AWS or on Azure. **Note:** Microsoft has updated licensing rules for dedicated hosts based on the purchase date.
Allocated in use	Rights that are allocated and are used to license installations.
Not allocated in use	Number of rights that are used to license installations, but not allocated. When this value is greater than 0, two remediation options (Create Allocations and Remove Unallocated Installs) are automatically created for each unique license metric in the software model that meets this requirement, except User CAL and Device CAL.
Allocated not in use	Rights that are allocated but aren't being used to license any installations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: **Allocated not in use** reflects rights that are wasted because the user or device for which these rights have been allocated don't have the software installed. When this value is greater than 0, a Remove Allocations remediation option is automatically created for each unique license metric in the software model that meets this requirement.
Nontransferable rights	Remaining rights from a core pack that can't be used to license any additional devices. Nontransferable rights are available only for Microsoft Per Core and Microsoft Per Core with (CAL).
Not allocated	Number of rights that haven't been allocated (rights owned minus allocated regardless of whether installed or not).
Allocations needed	Number of allocations needed for compliance. Only used for Per Named User and Per Named Device license metrics.
Rights needed **Note:** This field is hidden by default. Select the personalize list icon to modify the fields that appear in the License Metric Results.	Number of rights that are required to cover unlicensed installations.
Unlicensed installs **Note:** This field is hidden by default. Select the personalize list icon to modify the fields that appear in the License Metric Results.	Number of unlicensed software installations that aren't covered by any entitlements.
Unlicensed SAP users (SAP only) **Note:** This field is hidden by default. Select the personalize list icon to modify the fields that appear in the License Metric Results.	Number of unlicensed SAP users that aren't covered by any entitlements.
Unlicensed options (Oracle only) **Note:** This field is hidden by default. Select the personalize list icon to modify the fields that appear in the License Metric Results.	Number of unlicensed Oracle database options that aren't covered by any entitlements.
Unlicensed subscriptions	Number of unlicensed software subscriptions that aren't covered by any entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Note: This field is hidden by default. Select the personalize list icon to modify the fields that appear in the License Metric Results.	
True-up cost **Note:** This field is hidden by default. Select the personalize list icon to modify the fields that appear in the License Metric Results.	Estimated cost of remediating unlicensed installations that are based on the lowest number of rights needed.
Potential savings **Note:** This field is hidden by default. Select the personalize list icon to modify the fields that appear in the License Metric Results.	Estimated cost saved by reclaiming removal candidates.
Downgrade rights **Note:** This field is hidden by default. Select the personalize list icon to modify the fields that appear in the License Metric Results.	Previous software versions that you can license using software entitlements for the latest software version.
Remediation Options	
Remediation action	Action to take to for compliance. ○ Purchase Rights ○ Remove Allocations ○ Create Allocations ○ Remove Unallocated Installs (Not available for Oracle database options) ○ Remove Unlicensed Installs (Not available for Oracle database options) ○ Remove Unlicensed Installs - Cloud (available only if you have cloud installations). ○ If the actionable rights value is 0, the **Remediation action** button will not appear.
Affects compliance	Specifies whether the remediation options affect compliance.
License metric	Specific license metric of the software model result.
Software model result	Specific software model result pertaining to the remediation option.
Status	Status of the remediation option.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ New (blue) ○ Complete (green) ○ Completed with Errors (yellow) ○ Void (red) ○ In Progress (yellow) In Progress state indicates that the remediation action is in progress. If removal candidates are being created, the status changes to **completed** once the removal candidates are created.
Rights not in use Rights not allocated Rights needed Reclaimable rights Unlicensed rights (Field shown is based on Remediation action type)	○ **Remove Allocations** action shows **Rights not in use** field. ○ **Create Allocations** action shows **Rights not allocated** field. ○ **Purchase Rights** shows **Rights needed** field. ○ **Remove Unallocated Installs** action shows **Reclaimable rights** field. ○ **Remove Unlicensed Installs** action shows **Unlicensed rights** field.
Actionable rights	Total rights affected by the action.
Purchase order	Purchase order number associated with the remediation option, if a purchase order was created.
True-up cost	Estimated cost of remediating unlicensed installations based on the lowest number of rights needed.
Unlicensed Subscriptions **Note:** This related list is shown only for subscription-based software products.	
Display name	Name of the unlicensed software subscription that is not covered by any entitlements.
User principal name	Name of the user that is associated with the unlicensed software subscription.
Software model	Software model that the unlicensed software subscription is associated with.
Subscription profile	Integration profile that the unlicensed software subscription is associated with.
Subscription type	Type of subscription.
Unlicensed Consumptions	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Note: This related list is shown only for consumption-based software models.	
Software model	Software model that has unlicensed software consumptions.
Subscription profile	Integration profile that has unlicensed software consumptions.
Units consumed	Number of software units that your users have consumed.
Contract start	Start date of your licensing contract.
Contract end	End date of your licensing contract.
Actual monthly consumption	Actual number of software units that your users consume per month.
Expected monthly consumption	Number of software units that you expect your users to consume per month.
Cost Center	Business unit that has unlicensed software consumptions.
Department	Department that has unlicensed software consumptions.
Location	Geographic location in which there are unlicensed software consumptions.
Company	Name of the company that has unlicensed software consumptions.

The Licensed Installs related list contains the software installations that are licensed. To view more information about a licensed software installation, open the corresponding Software Installation record by selecting the **Display name**. Refer to Software installation fields for detailed descriptions of each field in the Software Installation record.

The Unlicensed Installs related list contains the software installations that are unlicensed. To view more information about an unlicensed software installation, open the corresponding Software Installation record by selecting the **Display name**. Refer to Software installation fields for detailed descriptions of each field in the Software Installation record.

The Unlicensed Users related list contains the SAP system users that are unlicensed.

Note: This related list is shown only for the SAP publisher.

The Removal Candidates related list contains removal candidates related to software installations. For more information, see Removal candidates.

4. Execute remediation options for specific remediation actions by selecting an option from the Remediation Options related list and then selecting the applicable action.

Remediation option action buttons

Remediation option action	Action button	Result
Remove Unlicensed Installs	**Create All Removal Candidates**	When removal candidates are created for unlicensed

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Remediation option action	Action button	Result
		installs, the status is set to Awaiting Revocation.
Remove Unallocated Installs	**Create All Removal Candidates**	When removal candidates are created for unallocated installs, the status is set to Ready.
Remove Allocations	**Remove All Allocations**	When allocations are removed, the number of allocations is adjusted. When you select this button, a message is displayed on the screen indicating that the action is in progress.
Create Allocations	**Create All Allocations**	When allocations are created, the status of Remove Unallocated Installs remediation options (for the same license metric of the same software model result) are then set to Void. When you select this button, a message is displayed on the screen indicating that the action is in progress.
Purchase Rights	**Create Purchase Order** **Note:** The **Create Purchase Order** button creates a purchase order but is only shown when rights needed is greater than 0, and Procurement is active. The **Create Purchase Order** button remains active until the purchase order has finished processing. Therefore, to avoid the creating a duplicate purchase order for the same item, wait to run reconciliation again until after the purchase order has finished processing.	When a purchase order is created, the status of any Purchase Rights remediation options for the same software model result are then set to Void. Purchase order fields **Part number**, **Metric group**, **License metric**, and **Ordered quantity** are automatically populated with the content from the remediation option. **Metric group** and **License metric** fields are added to the purchase order form so the entitlement can be automatically created when the order is complete. A notification is shown if at least one active purchase order line item exists for the software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Remediation option action	Action button	Result
		Once a purchase order is created, the **Purchase order** field, containing the purchase order reference, is added to the remediation option.

A confirmation message is shown and all applicable removal candidates are added to the Removal Candidates related list.

Add a software removal candidate in Software Asset Management classic

Removal candidates reclaim software resources in your environment. They are created from reclamation rules, or can be created manually.

Before you begin

Role required: sam_user

About this task

Software reclamation is integrated with Workflow and Client Software Distribution to automate the process of uninstalling software from devices and reclaiming software rights. However, you can also create a removal candidate manually.

Procedure

1. Navigate to **All** > **Software Asset** > **Removal Candidates**
2. Select **New**.
3. On the form, fill in the fields.

Removal Candidate form

Field	Description
Number	Unique removal candidate number that is automatically generated.
Assignment group	Automatically set to the software managers group authorized to respond to removal candidates.
Assigned to	Person primarily responsible for working this task.
Name	Removal candidate name that is automatically generated. Contains the software installation display name.
Description	Description of why the task exists, and what the user must do, if they receive an approval.
State	Current state of the removal candidate. ○ Attention Required ○ Ready ○ Awaiting User ○ Awaiting Approval

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Awaiting Revocation ○ Closed Complete ○ Closed Skipped ○ Closed Canceled
Opened	Date the task was opened.
Closed	Date the task was closed.
Justification	Justification for becoming a removal candidate. ○ Low Usage (default) ○ Unallocated ○ Unlicensed ○ Restricted Software
Removal Candidate	
Applies to	Item type to which the reclamation rule applies. ○ Installed Software ○ Subscription Software ○ Engineering App License
Software installation	The software installation being reclaimed.
Engineering App License **Note:** Only appears if **Engineering App License** is selected in the **Applies to** list.	The Engineering application license that you want to reclaim.
User	Name of the user assigned to the software installation. This value can be changed so that another user receives the notification of software being uninstalled. If the **Bulk Reclamation** check box is selected, this becomes a mandatory field.
Bulk Reclamation	Select this check box to reclaim multiple software installations. Once you select this check box, the **Software installation** field is no longer visible. To add software installations, refer to sub steps mentioned in step 4.
Reclamation rule	The reclamation rule that created the removal candidate.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Rights to reclaim **Note:** Only shown if **Engineering App License** is selected in the **Applies to** list.	The number of rights that you want to reclaim. For example, you have 100 rights installed on a license server but you want to reclaim only 40 rights.
Potential savings	Estimated cost of savings if all removal candidates are in Closed Complete state, meaning the software was uninstalled and the rights were harvested (unused rights * average price per right from entitlements).
Notify user	Check box for notifying the user assigned to the hardware on which the software is installed requesting permission via email to remove the software.
Configuration item	The device on which the software is installed.
Activity	
Work notes	Used to track the actions that have been performed on this task.

4. Select **Save**.
   The removal candidate record is created. If you selected the **Bulk Reclamation** check box, perform the following sub steps to add software installations, before proceeding to the next step. If you didn't select the **Bulk Reclamation** check box, proceed to the next step.

   a. Select **Edit** in the Software Installation related list.

   b. In the Edit Members page, move the software installations from the Collection box to the Software Installation List box.
   Only the software installations that are assigned to the specified user appear in the Collection box.

   c. Select **Save**.
   The software installation you added appears in the Software Installations related list. The state of the removal candidate moves from **Attention Required** to **Ready** and a name is generated in the **Name** field. Continue to select **Edit** to add more software installations.
   If you decide to remove all software installations, then the state reverts back to **Attention Required** and the name no longer appears in the **Name** field. For the name to be generated and for the removal candidate to be in **Ready** state, at least one software installation must be selected in the removal candidate form.

5. Select **Reclaim**.

   Once your software installation is reclaimed and removed from your system, the Software Installation column becomes empty. You can refer to the following fields on the Software installation related list to give you insights into the history of the reclaimed software installation.

   - Display name
   - Product

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Publisher
- Software model

You may select any action button on the form to further configure the removal candidate. Action buttons are dependent on the removal candidate's justification and state.

Action buttons

Action	Description
Update	Update the removal candidate.
Close Complete	Reclaim rights and close the removal candidate.
Close Skipped	Close the removal candidate without reclaiming rights.
Delete	Delete removal candidate.

Reconciliation and product results

Field descriptions for the reconciliation results, product results, and software product results.

Reconciliation results

Reconciliation results are listed in the navigation path **Software Asset** > **Reconciliation** > **Historical Results**

Reconciliation Results form

Field	Description
Number	Unique identifying number that is generated during the reconciliation process.
Last reconciled	Date of last reconciliation run.
Ran for	All publishers, or specific publishers.
Publishers	Only shown if publishers were specified on which to run reconciliation.
Group	Group specified on which to run reconciliation. Values include None, Country, Department, Company, Region, and Cost Center.
Subgroup	Subgroup specified on which to run reconciliation. Values include None, Country, Department, Company, Region, and Cost Center.
Status	Status of the reconciliation. • Completed • In Progress • Failed
Progress	Percent complete and progress bar for the reconciliation run.
Progress summary	Specific step within the reconciliation process.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reconciliation Results form (continued)

Field	Description
	Note: This list column is not shown by default. You can personalize your list column settings to add it, if desired.

Software product results

You can access Software Models, Unlicensed Installs, and Removal candidates related lists from a product result record.

A product result for a licensable product is generated after reconciliation even if there are no software models defined for the product.

Note: A Software Model Results record is only created when a software model or entitlement exists for the product.

For licensable products, a software model is automatically created for any unlicensed installs, subscriptions, or options in the Product Results list that do not have an entitlement by default. See properties to change the *com.snc.samp.automaticsmrcreation* property setting. You can also set the *com.snc.samp.automaticsmcreation* property to have a software model created automatically for not-licensable products, if desired.

To view more information about a specific software product result, select an entry from the Product Results list. Refer to the following table for field descriptions.

Product Results form

Field	Description
Number	Unique product result number that is generated during the reconciliation process.
Publisher	Publisher of the software.
Product	Name of software product.
Group	Group to which the product result belongs.
Subgroup	Subgroup to which the product result belongs.
Latest	Indicates whether this product result is from the most recent reconciliation run.
Reconciliation result	Unique reconciliation result number that is generated during the reconciliation process.
Status	Status of the product. • Compliant • Not Compliant
True-up cost	Estimated cost of remediating non-compliance based on the lowest number of rights needed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Product Results form (continued)

Field	Description
Over-licensed amount	Estimated cost of rights not being used. The sum of all Over Licensed amount values from every software model result.
Potential savings	Estimated cost of savings if software installations are reclaimed. The sum of all potential savings from all removal candidates.
Licensed installs	Total number of installations that are licensed for the product.
Unlicensed installs	Total number of installations that are unlicensed for the product.
Software Model Results	
Status	Status of the software model.
Software model	Name of the software model.
Unlicensed installs	Total number of installations that are unlicensed for the associated software product.
True-up cost	Estimated cost of remediating non-compliance based on the lowest number of rights needed.
Over-licensed amount	Estimated cost of rights not being used.
Potential savings	Estimated cost saved if reclamation candidates are reclaimed.
Licensed Installs	
Display name	Name of the licensed software installation.
Publisher	Publisher of the software product.
Version	Version of the software product.
Discovery model	Software discovery model that represents the installed software product.
Installed on	Device on which the product is installed.
Assigned to	User to which the product is assigned.
Unlicensed Installs	
Display name	Name of the unlicensed software installation.
Publisher	Publisher of the software product.
Version	Version of the software product.
Installed on	Device on which the product is installed.
Assigned to	User to which the product is assigned.
Unlicensed Subscriptions **Note:** This related list is only shown if the software product is a subscription.	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Product Results form (continued)

Field	Description
Publisher	Publisher of the software product associated with the unlicensed subscription.
Product	Name of the software product associated with the unlicensed software subscription.
User	Name of the user associated with the unlicensed software subscription.
User principal name	Email address of the associated user.
Software model	Software model associated with the unlicensed software subscription.
Subscription profile	Integration profile associated with the unlicensed software subscription.
Unlicensed Users **Note:** This related list contains SAP system users and is only shown for SAP publisher.	
Display name	Unique display name.
User	User in the SAP system.
SAP user id	SAP ID of the user with access to an SAP system.
Email	SAP user email.
Names	First and last names of the SAP user.
User type	The type of user in the SAP system. • Dialog • System
License type	The named user type value assigned to the user in the specified SAP system.
Named user type	Normalized named user type assigned to the user in the specified SAP system.
SAP client	SAP client from which the user information was pulled.
Removal Candidates	
Number	Removal candidate number.
Name	Name of the removal candidate.
Justification	Justification for becoming a removal candidate. • Low Usage (default) • Unallocated

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Product Results form (continued)

Field	Description
	• Unlicensed • Restricted Software
Product	Name of the product.
Publisher	Name of the publisher.
State	State of the removal candidate. • Attention Required • Ready • Awaiting User • Awaiting Approval • Approval • Awaiting Revocation • Closed Complete • Closed Skipped
Potential savings	Savings to be gained from reclaiming unused software installations.

Create averages for product life cycles in Software Asset Management classic

Create averages to calculate software End of Life (EOL) and End of Support (EOS) life cycles in the Software Asset Management classic application.

Before you begin

Role required: model_manager

About this task

You can create averages that can be used globally for all products and publishers or you can create averages specific to a product or a publisher. These averages are used to create calculated life cycles for products. For details on calculated life cycles, see Product life cycles.

Procedure

1. Navigate to **Software asset** > **Software lifecycle averages**.
2. Select **New** to open the Software lifecycle averages page.
3. On the form, fill in the fields.

Field	Description
Type	The type of option you select for creating life cycles. Choose from the following options:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ **Custom industry average**: Refers to the industry averages based on the GA dates. ○ **Product**: Refers to a specific product. This includes custom products too. ○ **Publisher**: Refers to a specific publisher. This includes custom publishers too.
Display name	A unique name for this life cycle average record.
Product	his field appears only if you select the value **Product** in the **Type** field
Publisher	This field is automatically populated once you select a product. If you selected the value **Publisher** in the **Type** field, then you select a publisher.
Domain	Indicates the domain in which your instance is located.
Average end of life period (months)	Specify the number of months for the EOL life cycle.
Average end of support period (months)	Specify the number of months for the EOS life cycle.
Active	Indicates that the life cycle average record will be used for creating software life cycles.

4. Select **Submit**.
   The record is created and appears in the Software lifecycle averages list view.

Add a software client access record in Software Asset Management classic

Add a client access record to track and manage the users or devices that are accessing a particular version of your server software using a client access license (CAL).

Before you begin

Role required: sam_admin

Note: You can also use the sam_user role to view and read client access records. However, you cannot use this role to create client access records.

About this task

Software Asset Management uses client access records to reconcile server software based on the following license metrics:

Metric group	License metric
Citrix	• Per User • Per User/Device

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Metric group	License metric
Common	• User CAL • Device CAL • User/Device CAL
IBM	• Authorized User • Authorized User Value Unit • Employee User Value Unit • External User Value Unit
Microsoft	• User CAL • Device CAL • Per Core (with CAL)
Oracle	Named User Plus
CrowdStrike	• Reserved Hourly Average Sensor • Sensor Subscription **Note:** These license metrics are available with Yokohama Patch 1, Software Asset Management - SaaS License Management (sn_sam_saas_int) 15.0.8, and Software Asset Management (sn_itam_samp) 2.1.0 version onwards. If you are on any version for Yokohama below Patch 1, refer KB1801232.

License metrics are set on the software entitlement form and can be accessed from the **Metric Attributes** related list on the software model form.

Important: You can enable the Software Asset Management application to automatically create client access records for Oracle Database using the **Auto-generate client access for allocations** option on the corresponding software model. To use this option, you must request the Data Collection for Oracle Global Licensing and Advisory Services application from the ServiceNow Store. See Software model fields for more details on the **Auto-generate client access for allocations** option. See Request Data Collection for Oracle Global Licensing and Advisory Services (GLAS) for more details on the Data Collection for Oracle Global Licensing and Advisory Services application.

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Client Access** and then select **New**.
2. On the Client Access form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Client Access form

Field	Description
Name	Name of the client access record.
Software model	Software model of the server that you are granting users or devices access to.
Type	Type of CAL that is associated with the client access record. Select one of the following options: ○ **User CAL**: Licenses each user that accesses the associated server, regardless of the number of devices that each user is using to access the server. For example, if two users are accessing Microsoft Windows Server, the corresponding software entitlement must include two User CALs. If you select this option, you can assign the associated User CALs to specific users. See step 3 for more details. ○ **Device CAL**: Licenses each device that accesses the specified server, regardless of the number of users that are using each device to access the server. For example, if two devices are accessing Microsoft Windows Server, the corresponding software entitlement must include two Device CALs. If you select this option, you can assign the associated Device CALs to specific devices. See step 3 for more details. ○ **User/Device CAL**: Licenses each user or device that accesses the associated server. **Note:** If you are using a Citrix software model, the User/Device CAL type is based on the user/device licenses that are assigned to your users or shared devices. For example, if two users and two devices are accessing Microsoft Windows Server, the corresponding software entitlement must include two User CALs and two Device CALs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	If you select this option, you can assign the associated User and Device CALs to specific users and devices. See step 3 for more details. ○ **Authorized User**: Licenses each user who accesses an IBM software product. **Note:** This CAL type is applicable to IBM software only. ○ **Authorized User Value Unit**: Licenses the number of select users who access an IBM software product. **Note:** This CAL type is applicable to IBM software only. ○ **Employee User Value Unit**: Licenses the total number of users within your organization who access an IBM software product. **Note:** This CAL type is applicable to IBM software only. ○ **External User Value Unit**: Licenses the total number of users outside your organization who access an IBM software product. **Note:** This CAL type is applicable to IBM software only.
WebLogic application **Note:** This field appears only if you select an Oracle WebLogic Server software model.	Oracle WebLogic Server application to which your users or devices are granted access.
Database instance **Note:** This field appears only if you select an Oracle Database software model.	Oracle database instance that accesses and manages the data in your Oracle database.
Source **Note:** This field appears only if you select an Oracle Database software model.	Source of your Oracle data. This field is automatically set to one of the following options: ○ **ServiceNow**: Indicates that the client access record data was generated automatically through the SAM - Sync Auto-generated Client Access with DB Server

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Users scheduled job, which runs daily or on-demand. ○ **Internal**: Indicates that the client access record data was added manually.
Count	Number of unique users or devices that are granted access to the associated server. On automatically generated client access records for Oracle Database or Oracle WebLogic Server, this field populates automatically based on the number of users or devices that are currently added to the record. See step 3 for more information on how to add users or devices to the client access record. **Note:** If you are using a Citrix software model and User/Device CAL type, the **Count** field is based on the number of user/device licenses that are assigned to your users or shared devices.
PaaS **Note:** This field appears only if you select an Oracle Database software model.	Option to indicate whether your Oracle database instance is managed by the Amazon Relational Database Service (RDS) on Amazon Web Services (AWS).
Cost Center	Cost center of the users or devices that are granted access to the associated server.
Department	Business department of the users or devices that are granted access to the associated server.
Location	Geographic location of the users or devices that are granted access to the associated server.
Company	Company of the users or devices that are granted access to the associated server.

3. To assign the associated CALs to specific users or devices, add those users or devices to your client access record based on the CAL type that you selected in the **Type** field.
   By assigning CALs to specific users or devices, you can prevent those users or devices from being counted multiple times across different client access records during reconciliation.
   - If you set the **Type** field to **User CAL**, **User/Device CAL**, **Authorized User**, **Authorized User Value Unit**, **Employee User Value Unit**, or **External User Value Unit**, add the users that you want to assign your user-based CALs to.

     Note: If you are using a Citrix software model and User/Device CAL type, add the users that you want to assign a user/device license to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select the **Users** tab.

b. In the **User** field of the Client Access User Breakdowns list, double-click **Insert a new row...**.

> **Note:** If you are using an Oracle Database software model, double-click **Insert a new row...** in the **Database user** field of the Client Access User Breakdowns list instead.

c. When prompted, search for and select a user that you want to assign a user-based CAL to.

d. Select the Save icon .

The **Device**, **Active**, **User Type**, and **Source** fields populate automatically for the specified user. However, you can modify the **Device**, **Active**, and **User type** fields as needed.

e. Repeat steps b-d for each user that you want to assign a user-based CAL to.

- If you set the **Type** field to **Device CAL** or **User/Device CAL**, add the devices that you want to assign your device CALs to.

> **Note:** If you are using a Citrix software model and User/Device CAL type, add the devices that you want to assign a user/device license to.

a. Select the **Devices** tab.

b. In the **Device** field of the Client Access Device Breakdowns list, double-click **Insert a new row...**.

c. When prompted, search for and select a device that you want to assign a device CAL to.

d. Select the Save icon .

The **Active** and **Source** fields populate automatically for the specified device. However, you can modify the **Active** field as needed.

e. Repeat steps b-d for each device that you want to assign a device CAL to.

4. To track and license the configuration items (CIs) that the associated server is installed on, add them to the client access record.

> **Important:** This step is not applicable if your client access record is associated with an Oracle WebLogic Server software model or you have enabled the **License all installs accessed by clients** option on the associated software model. If this option is enabled, CIs are licensed based on conditions that you specify on the software model, such as software install conditions. See Software model fields for more details on this option.

For Windows Server, each server installation requires Per Core (with CAL) rights that are licensed separately from the User and Device CAL rights in associated client access records. Other products like Oracle Java do not require rights to be licensed separately for server installations. For example, if you use CALs to license the users and devices that are accessing Oracle Java, you can enable Software Asset Management to automatically mark the corresponding Oracle Java installations as licensed. In this scenario, Software Asset Management licenses the Oracle Java installations as part of CAL licensing.

To enable this capability, you must add all CIs that a given server is installed on to the associated client access record. By specifying these CIs, you can enable Software Asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Management to determine which server installations your users and devices are connected to. After all users and devices on the client access record are licensed, all server installations on the specified CIs are marked as licensed. No additional licenses are consumed for these installations.

a. Select the **Devices with Installations** tab.

b. In the **Device** field of the Client Access Installed Devices list, double-click **Insert a new row...**.

c. When prompted, search for and select a CI that the associated server is installed on.

d. Select the Save icon .
The **Active** field populates automatically for the specified CI. However, you can modify this field as needed.

e. Repeat steps b-d for each CI that the associated server is installed on.

5. Select **Update**.

What to do next

After you create a client access record, reconciliation runs on the associated server software as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench. Use these results to determine your license compliance position and to remediate any non-compliance.

You can remediate non-compliance for your server software using the following remediation options:

- **Purchase Rights**: Generates a purchase order when the number of rights needed is greater than the number of rights owned across all client access records for the specified server software.
- **Create Allocations**: Allocates rights to unlicensed users or devices that have been added to the client access records for the specified server software.
- **Remove Allocations**: Removes rights from licensed users or devices when sufficient rights are unavailable.

Add a custom software product in Software Asset Management classic

If a software product does not exist in the Software Library, you can add a custom product. Custom products enable you to normalize and account for homegrown software, or software that is not yet part of the Software Library.

Before you begin

Role required: sam_admin

About this task

The product and publisher combination is used during discovery model normalization. If the custom product exists, a message is shown.

Procedure

Navigate to **All** > **Software Asset** > **Administration** > **Custom Products** and create a new record (see table for field descriptions).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Custom Software Product form

Field	Description
Publisher	Publisher of the custom software product. If it does not exist, a new one can be created on the Publisher field Companies lookup list.
Product	Name of the custom software product.
Subscription software	Option that indicates that the software has a subscription.
Product type	Product type of the custom software product. • Child: A subcomponent of main software (not licensable). • Driver: A software product that controls a device. • Licensable: A software product that is licensable. • Not Licensable: A software product that is not licensable. • Patch: A software product designed to update, fix, or improve an existing computer program. • Unknown: A software product that is unknown.
Product classification	Official UNSPSC classification.
Exclude from content service	Option that excludes the custom product details from being shared with Software Asset Management Content Service if opted in.
Active	Option that indicates the rule is active.

View publisher part number (PPN) suggestions in Software Asset Management classic

View content service suggestions for your custom PPNs and DMAPS in the Software Asset Management classic application.

Before you begin

PPN suggestions are available only if a corresponding match is found for your custom PPN in the Content Service. The PPN suggestion records are stored in the Part number suggestions [samp_sw_part_number_suggestion] table.

Role required: sam_admin

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Part number suggestions**.
2. Open a suggestion record to view the Part number suggestion page.
   You can view the custom PPN details in the top part of the Part number suggestion page. The second half of the page contains the suggested part number details. All the entitlements where the custom PPN is used appear in the **Impacted entitlements** tab. All the software

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

models where the custom DMAP is used appear in the **Impacted software models** tab. If no impacted software models exist, then this tab doesn't appear.

3. Select **Accept** or **Reject**.
   - **Accept**: The Content Service PPN and DMAP replace the custom PPN and DMAP. In the impacted entitlement, the content service PPN is replaced. Similarly, the content service DMAP is replaced on the software model.
   - **Reject**: The status of this record changes to rejected and you continue to use the custom PPN.

Subscriptions for Software Asset Management

The ServiceNow platform uses a licensing method where your organization is charged for using the IT Asset Management applications- ServiceNow Software Asset Management.

Software Asset Management licensing enables you to pay for resource categories that you use. To calculate the cost, Software Asset Management uses Subscription Units. A Subscription Unit is a unit of measure used to Managed IT Resources using defined ratios. The customer value of managing different types of IT resources varies. Subscription Units allows for a single unit price to be applied via ratios to those different IT resource type to reflect that varying customer value. To know more about managed IT resources and Subscription Unit ratios, see the Subscription Unit Overview on the https://www.servicenow.com/products/entitlements-packages.html.

Subscription summary for IT Asset Management application

You can view how many subscriptions for IT Asset Management applications your organization purchased and allocated.

Review the configuration item (CI) allocation and allocation level to see how your organization uses IT Asset Management application subscriptions and plan upcoming subscription needs.

Navigate to **ITAM Licensing** > **ITAM Subscription Summary** to view the subscription summary.

View the following statistics on subscriptions purchased a la carte and by bundles:

Name

The name of either subscription bundle or IT Asset Management application, if your organization purchased subscriptions per application separately (a la carte).

Purchased

The number of purchased subscriptions per bundle or application (a la carte).

Allocated

The number of consumed subscriptions from a bundle or application (a la carte). For bundles, this field shows the highest number of consumed subscriptions by applications that are part of the bundle. For example, if Software Asset Management consumed 300 subscriptions and Hardware Asset Management consumed 200 subscriptions, this field shows 300 for the bundle covering these applications.

The color code indicates the percentage of the subscriptions that your organization consumed. By default, the color code threshold is 90%.

- Green — Your organization has used less than 90% of purchased subscriptions.
- Yellow — Your organization has used more than 90%, but less than 100% of purchased subscriptions.
- Red — Your organization has used 100% or more and exceeded the number of purchased subscriptions. Purchased subscriptions are overdrawn.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Start date/End date

The dates for which this subscription is valid.

The licensing module calculates and displays subscription consumption as follows:

Subscriptions by bundle only

When you purchase subscriptions in bundles, you get the same number of subscriptions for all IT Asset Management applications covered by the bundle. For example, for a bundle of 500 that covers Software Asset Management and Hardware Asset Management, your organization receives 500 subscriptions for Software Asset Management and 500 subscriptions for Hardware Asset Management.

The licensing module subtracts the number of consumed subscriptions from the bundle subscriptions for the relevant application. Bundle subscriptions cover specific applications. You cannot use bundle subscriptions for other applications, even if these other applications are part of the same bundle. For example, you purchased a bundle of 500 covering Software Asset Management and Hardware Asset Management, and you used up all 500 Software Asset Management subscriptions. You cannot use the spare Hardware Asset Management subscriptions for Software Asset Management.

If your organization exceeds the number of purchased subscriptions, the bundle size is automatically adjusted to the number of consumed subscriptions. When that happens, the licensing module recalculates levels of consumption for all applications covered by the same bundle.

The Subscriptions window displays the actual number of consumed subscriptions under **Allocated**. The red color dot in **Allocated** indicates that the bundle is overdrawn.

Subscriptions a la carte only

The licensing module subtracts the number of consumed subscriptions from the a la carte subscriptions for the relevant application. The Subscriptions window displays the information for purchased and allocated subscriptions for IT Asset Management applications.

If your organization exceeds the number of purchased subscriptions for an IT Asset Management application, you cannot use unconsumed subscriptions for another application.

If your organization exceeds the number of subscriptions, the Subscriptions window shows the relevant a la carte subscription is overdrawn.

Subscriptions for the same applications both in bundle and a la carte

If you purchased IT Asset Management subscriptions both in bundle and a la carte, the licensing module always subtracts the number of consumed subscriptions from the bundle before deducting from the number of subscriptions purchased a la carte. For example, there is a bundle of 500 subscriptions covering Software Asset Management and Hardware Asset Management. In addition, there are 250 subscriptions for Software Asset Management purchased a la carte. The first 500 subscriptions consumed by Software Asset Management are consumed by the bundle. Only when Software Asset Management exceeds the number of subscriptions in the bundle, the licensing module starts deducting from subscriptions purchased a la carte and shows them as subscriptions allocated to Software Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If your organization exceeds the number of subscriptions purchased in bundle and a la carte, the licensing module considers it as overdrawn from the a la carte subscriptions. In this case, the Subscriptions window indicates that the a la carte subscriptions are overdrawn.

Managed IT Resource types

There are five IT Resource categories in ServiceNow Software Asset Management - Server, End User Computing Device, SaaS Subscription User, PaaS Resources, and IaaS Storage.

- Server is any physical or virtual server that is represented as a configuration item (CI) in the CMDB tables listed in the following license resource categories and managed by the Software Asset Management application.
- End User Computing Device is any physical or virtual non-server CI in the CMDB tables listed in the following license resource categories and managed by the Software Asset Management application.
- SaaS Subscription User is any unique User Principal name in the SaaS Subscription User table listed in the following license resource categories and managed by the Software Asset Management application.
- PaaS Resources are cloud-based platform services that are represented as a CI in the CMDB tables listed in the following license resource categories and managed by the Software Asset Management application.
- IaaS Storage is any cloud-based infrastructure service represented as a CI in a CMDB table listed in the following license resource categories and managed by the Software Asset Management application.

Servers and End User Computing Devices are managed by the Software Asset Management application when the installed software on the Managed IT Resources is represented in the Software Installation [cmdb_sam_sw_install] table.

Software Asset Management License Resource Categories

Resource category	Subscription unit ratio	Model category
Server	1:1	• cmdb_ci_server • cmdb_ci_win_server • cmdb_ci_linux_server • cmdb_ci_aix_server • cmdb_ci_esx_server • cmdb_ci_solaris_server • cmdb_ci_hyper_v_server • cmdb_ci_hpux_server Any CMDB classes derived from the above listed classes or cmdb_ci_hardware and not defined as another Managed IT Resource type.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management License Resource Categories (continued)

Resource category	Subscription unit ratio	Model category
End user computing device	1:4	• cmdb_ci_computer • cmdb_ci_handheld_computing • cmdb_ci_pc_hardware Any CMDB classes derived from cmdb_ci_pc_hardware.
SaaS subscription user	1:15	samp_sw_subscription
PaaS resources	1:3	• cmdb_ci_database • cmdb_ci_cloud_database Any child classes of the above listed classes.
IaaS storage	1:3	cmdb_ci_storage_volume Any child classes of the above listed classes.

View license report for the IT Asset Management application

Resources that the IT Asset Management applications discover, monitor, and provision are configuration items (CIs) stored in the CMDB. The ITAM licensing module combines this information on CIs with the information on subscriptions your organization purchased to produce statistics on subscription use by IT Asset Management applications.

Before you begin

The process of collecting and aggregating information for licensing purposes consists of the following interactions. As a result, you can view the statistics on how your organization uses purchased subscription units.

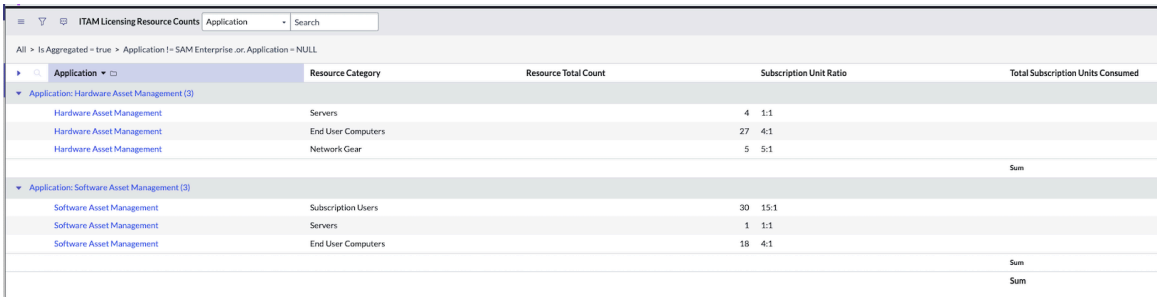
1. The IT Asset Management applications count CIs and assign them to CI categories daily.
2. The IT Asset Management applications daily report CI count by CI category to the IT Asset Management licensing module. If features of the same application report the same CIs as their resources, the CI count is manipulated to remove the duplication.
3. The licensing module correlates the daily average CI counts for IT Asset Management applications with the licensing information from the customer contract to produce license statistics.

Role required: usage_admin

Procedure

1. Navigate to **All** > **ITAM Licensing** > **ITAM License Report**.
2. Select an application to view the subscription for a particular CI category.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



You can view the following information on CI count and subscriptions purchased for each IT Asset Management application separately (a la carte):

- **Resource Category**: CI categories for IT Asset Management applications.
- **Resource Total Count**: CI count for CIs organized by CI categories, for each IT Asset Management application.
- **Subscription Unit Ratio**: Ratios define how many CIs of a certain CI category require a subscription. The Software Asset Management application has pre-defined values for End User Computers (4:1), for Servers (1:1), for Storage Volumes (3:1), for Databases (3:1), and for Subscription Users (15:1).
- **Total Subscription Units Consumed**: The number of subscriptions per CI category for each IT Asset Management application that your organization consumed. The licensing module calculates this number by applying the subscriptions ratio to the CI count number for each application's CI category.

For licensing purposes, the Software Asset Management application only considers CIs with software installs discovered within the last 90 days or those where the last discovered as empty. Additionally, all CIs are excluded that have a column added to the cmdb_ci_hardware table and that column name is referenced in the property labeled *`Enter the name of the true/false field added to cmdb_ci_hardware table to exclude software installed on selected devices from Software Asset Management`*. For more information on excluding CIs, see Exclude software assets on CIs.

Supported software publisher licenses

With Software Asset Management, there are several publisher packs that can be used to extend functionality between the ServiceNow AI Platform and your third-party software applications.

The following Software Asset Management publisher pack plugins can be requested from ServiceNow personnel for activation. See Request Software Asset Management for more information on how to request these plugins.

- Adobe
- Citrix
- IBM (includes both IBM and Red Hat Enterprise Linux)
- Microsoft
- Oracle
- SAP
- VMware

Each publisher has a set of license metrics specific to that metric group. License metrics are set in software entitlements and used for reconciliation (metric group, license metric, and software model combination).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Publisher pack plugins

Plugin	Description
Software Asset Management Professional for Adobe (com.sn_samp_adobe)	Provides additional capabilities to reconcile Adobe subscription software.
Software Asset Management Professional for Citrix (com.sn_samp_citrix)	Provides additional capabilities to reconcile Citrix software, such as Virtual Applications and Virtual Desktop.
Software Asset Management Professional for IBM (com.sn_samp_ibm)	Provides additional capabilities to reconcile IBM products using PVU and RVU license metrics. This plugin also provides additional capabilities to reconcile Red Hat Enterprise Linux software, such as Red Hat Enterprise Linux Server and Red Hat Enterprise Linux for Virtual Datacenters.
Software Asset Management Professional for Microsoft (com.snc.samp.microsoft)	Provides additional capabilities to reconcile Microsoft software, such as Microsoft SQL Server.
Software Asset Management Professional for Oracle (com.snc.samp.oracle)	Provides additional capabilities to reconcile Oracle software, such as Oracle Database.
Software Asset Management Professional for SAP (com.sn_samp_sap)	Provides additional capabilities to reconcile SAP named user compliance and optimization.
Software Asset Management Professional for VMware (com.sn_samp_vmware)	Provides additional capabilities to reconcile VMware software, such as vCenter and vSphere.

Publisher pack dashboards

View compliance analysis results for the following publishers on the Software Publisher Analytics dashboards.

- Adobe
- Citrix
- IBM
- Microsoft
- Oracle

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- SAP
- VMware

Note: You must have one of the publisher pack add-ons (other than Adobe) activated to see the Software Publisher Overviews dashboard navigation module. In addition, the corresponding publisher pack must be activated to see the compliance analysis results tab for that publisher.

View compliance analysis results for Microsoft Office 365 and Adobe Cloud on the Office 365 and Adobe dashboard.

Note: The Software Asset Management Professional for Adobe publisher pack add-on must be activated to see the Office 365 and Adobe Cloud dashboard.

Software Asset Management publisher pack for Adobe

Use the Software Asset Management publisher pack for Adobe to track compliance using Adobe - specific licensing metrics and integrate with Adobe Cloud.

Adobe licensing options

The Adobe publisher pack (com.sn_samp_adobe) adds Adobe - specific licensing options for software entitlements.

Field	Options
Agreement type	• Generic • Enterprise Term License Agreement (ETLA) • Cumulative Licensing Program (CLP) • Transactional Licensing Program (TLP) • Value Incentive Plan (VIP)
License Metric	• Per Device • Per User • User Subscription

To use the Adobe - specific licensing options, select the Adobe metric group for the software entitlement.

Adobe Cloud integration

Create an Adobe Cloud integration profile to compare subscriptions with software installations for compliance reporting.

Note: Installation discovery sources include ServiceNow Discovery, Microsoft SCCM, and other third-party discovery sources that can integrate as a data source in the ServiceNow CMDB.

For instructions on how to create an Adobe Cloud integration profile, see Integrating with Adobe Cloud.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Adobe Cloud reporting

Adobe Cloud reports can be accessed by navigating to **Reports** > **View/Run** and searching all reports for Adobe.

- Adobe Cloud Users without Installations
- Underused Adobe Cloud Installations

You can view Adobe subscriptions, compliance, and cost using the Office 365 & Adobe Cloud dashboard in Software Asset Management classic or Publisher overview for Adobe Systems in the Software Asset Workspace.

Integrating with Adobe Cloud

Integrate your Software Asset Management application with Adobe Cloud services to track your software subscriptions and to determine your license compliance.

The Adobe Cloud integration supports the following Adobe Cloud services:

- Adobe Creative Cloud
- Adobe Experience Cloud
- Adobe Document Cloud

Note: You can create an Adobe Cloud integration only if you're using the Adobe Creative Cloud for Enterprise subscription plan. If you're using any other subscription plan, such as Adobe Creative Cloud for Teams, Education, or Individuals, you can't create an integration.

Integrate your Adobe subscriptions with Software Asset Management for compliance reporting using Adobe authentication. For more information about Adobe authentication integrations and certificates, see the Adobe Authentication Guide.

You can integrate your ServiceNow® instance with Adobe Cloud services using the OAuth Server to Server credential authentication method.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Adobe Cloud application	Authentication scopes
Download subscriptions	Administrator	None

Setting up Adobe Cloud integration

Manage Adobe Cloud license compliance and optimization by performing the following steps:

- **Prerequisites**

  Before you begin with Adobe Cloud integration, confirm that all prerequisites are met.

1. Install Software Asset Management Professional for Adobe

   Install the Software Asset Management Professional for Adobe (com.sn_samp_adobe) plugin to access the Adobe Publisher Pack features in the Software Asset Management application.

2. Install Software Asset Management - SaaS License Management plugin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Install the Software Asset Management - SaaS License Management (com.sn_sam_saas_int) plugin to create and manage integrations with your SaaS and Single Sign-On (SSO) applications. These integrations enable you to track license usage and reclaim unused licenses effectively.

3. Verify content updates for Software Asset Management

   The content library on your instance is updated regularly through the Software Asset Management Content Service. The Software Asset Management application provides automated content to simplify software normalization, offering data such as life cycle information, downgrade rights, and suite definitions. This data is essential for accurate license compliance and optimization.

4. Create a success goal

   Create a success goal to track the success of Adobe Cloud configuration setup on the Software Asset Management application.

5. Set up OAuth on Adobe Cloud

   Set up OAuth Server-to-Server credentials on the Adobe Cloud services portal before creating an Adobe Cloud integration profile on the Software Asset Management application.

- **Software Asset Management configurations**

  Configure your Software Asset Management application, which includes setting up user accounts, managing licenses, and confirming compliance with Adobe's software usage policies.

  1. Set up Adobe Cloud integration profile

     Create an Adobe Cloud integration profile in the Software Asset Management application to import user subscription data, determine license compliance, and identify optimization opportunities. If you manage multiple tenants, create a separate integration profile for each.

  2. Configure user resolution rules

     Resolve or match the Adobe Cloud user to the ServiceNow user (sys_user) to determine the suitable license compliance and provide correct optimization recommendations.

     Note: If the licenses are assigned to non-human users, such as email accounts, the user resolution process is optional for you.

  3. Review and configure reclamation rules

     The Software Asset Management application automatically provides base system reclamation rules when you create an integration profile for Adobe Cloud. You can customize these rules based on your specific activity thresholds, such as 15, 30, 90, or 180 days. For more information, see Review a software reclamation rule.

  4. Pull subscription data

     After the Adobe Cloud integration is complete, the subscription data is pulled into the Software Asset Management application when the SAM - Import Adobe User Subscriptions scheduled job runs. If you want to run this job on demand for pulling the latest subscription data, contact the ServiceNow administrator.

  5. Set up software models

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Software Asset Management application integrates with Adobe Cloud to automatically generate software models based on assigned subscriptions. These models include suite components, downgrades, and life cycle details to confirm compliance and optimize licensing.

Important: You must verify that no software models are created without a Discovery Map (DMAP) to confirm inclusion of all required details.

Alternatively, you can create software models manually for any unknown identifiers. For more information, see Create a software model in the Software Asset Workspace.

6. Set up entitlements

   Add your entitlements for the software models created automatically or manually in the previous step. If you have already set up entitlements using a Publisher Part Number (PPN), those software models are used in this integration to avoid duplicates.

   Important: To achieve a cleaner implementation, you must verify that no software entitlements are created without a PPN.

- **Software Asset Management configurations verification**

  Review and validate the Software Asset Management configurations to track and manage Adobe Cloud licenses and usage accurately.

  1. Verify the complete pull of all subscriptions

     Verify with the Adobe Cloud administrator that all subscription records have been pulled successfully. You must verify that the subscription records are complete and the subscription account details are accurate.

  2. Run health check

     Run a health check on the Health check dashboard by selecting **SaaS** and **General** to verify the Adobe configurations and review the findings for each suite.

  3. Verify the pull of all required software usage

     Verify if the Software Asset Management application has pulled the usage details from discovery sources such as SCCM. Usage details, such as last activity, is required to identify user subscriptions with low usage and determine optimization opportunities. When the subscription data is pulled, the SAM - Optimize Adobe Subscriptions scheduled job runs monthly to optimize the Adobe Creative Cloud subscriptions.

  4. Create a success goal

     Create a success goal to manage your Adobe Cloud subscription and compliance.

  5. Run reconciliation

     Run reconciliation on the Software asset overview page to verify that the licenses are consumed according to the Software Asset Management configurations. Reconciliation runs automatically each week, but you can also trigger it manually as needed. For quicker results, run reconciliation with Adobe as the publisher to verify the Adobe Cloud license consumption.

  6. Check license position report

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Check your overall compliance positions for Adobe Cloud and associated products in the License Position Report. For Adobe-specific license position, select Adobe Systems as the publisher.

7. Act on unlicensed subscriptions

   Identify and address the unlicensed Adobe Cloud subscriptions.

8. Act on optimization recommendations

   Software Asset Management supports various optimization use cases, which you can view on the Software asset analytics page. For Adobe-specific optimization, select Adobe as the publisher.

Integrate Adobe Cloud using OAuth Server-to-Server credentials

Integrate your ServiceNow® instance with Adobe Cloud services by using OAuth Server-to-Server credentials by following the steps.

1. Create a project and add APIs using OAuth
2. Create an Adobe Cloud integration profile using OAuth

Create a project and add APIs using OAuth

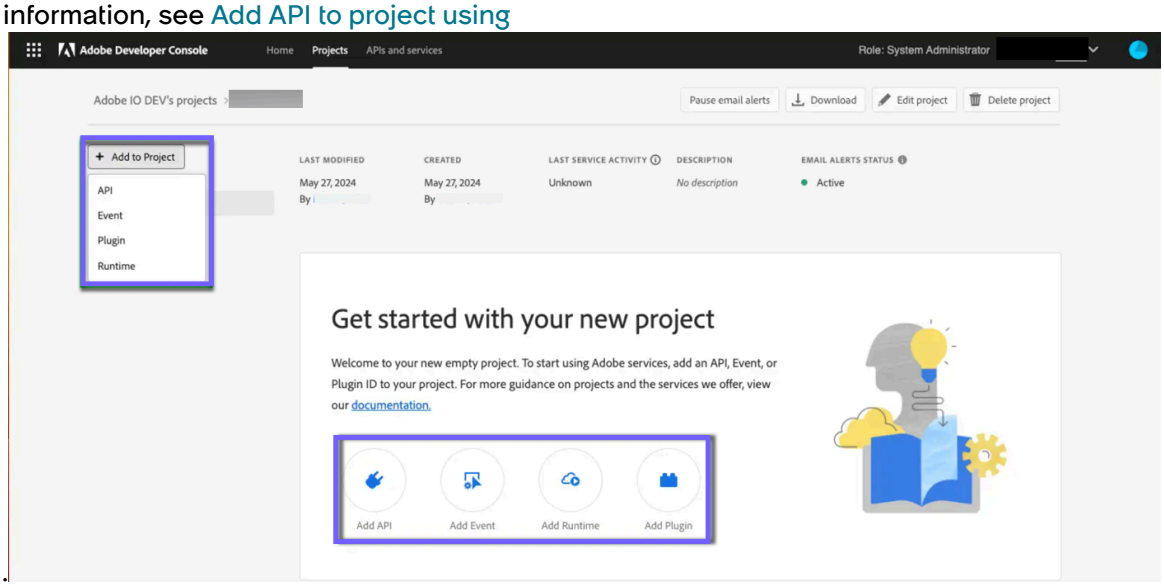
Create a project in the Adobe Developer Console for accessing Adobe APIs and add APIs to your project using OAuth.

Before you begin

Role required: Adobe Cloud admin

Procedure

1. Create a project in the Adobe Developer Console to access the Adobe APIs by selecting **Create new project**.
   For more information, see Projects Overview.
2. Add an API to your project by selecting **Add API**.
   For more information, see Add API to project using OAuth.



3. Select **User Management API** for the Adobe service that you want to integrate with.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

This service enables you to access the Adobe user management API. After you successfully add the API to your project, you're redirected to the API overview page.

4. Select **Next**.
5. On the Configure API form, expand **Credentials**.
6. Select the **OAuth Server-to-Server** authentication.
7. Provide a name in the **Credential name** field to find the correct API credential easily on the **Admin Console** > **Users** > **API Credentials**.
   You can also modify the name later in your project on the OAuth Server-to-Server credential overview page.
8. Select **Save configured API**.
   The following values are displayed on the credential overview page:
   - CLIENT ID
   - CLIENT SECRET
   - SCOPES
   - CREDENTIAL NAME
   - TECHNICAL ACCOUNT ID
   - TECHNICAL ACCOUNT EMAIL
   - ORGANIZATION ID

   Note:

   Copy the CLIENT ID and ORGANIZATION ID and also retrieve the CLIENT SECRET to use them later.

9. Get the Connection URL (Instance URL) from the Adobe Developer Console to create and get an OAuth token for Adobe Cloud.

   a. In the Generate access token section, select **View cURL command**.

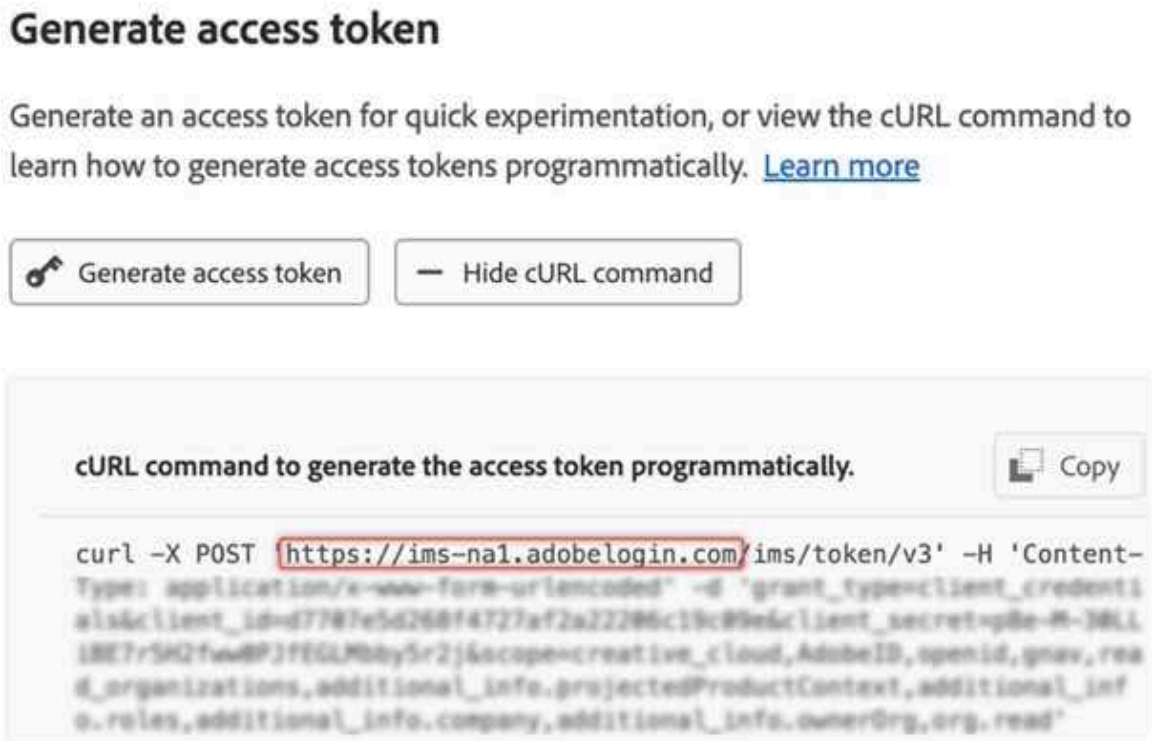
   b. Copy the Connection URL.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

Copy only the required URL from the entire command.

For example, here the Connection URL is the highlighted part.



Create an Adobe Cloud integration profile using OAuth

Create an Adobe Cloud integration profile on your ServiceNow instance by using OAuth credentials to track your software subscriptions and to determine your license compliance.

Before you begin
Role required: sam_admin, sam_integrator

Activate the following plugins:

- Software Asset Management Professional for Adobe (com.sn_samp_adobe)
- Software Asset Management - SaaS License Management (sn_sam_saas_int) from ServiceNow Store

About this task
If you're using Software Asset Workspace, the option to create the Adobe Cloud integration profile in Core UI is inactive.

Important: Adobe has deprecated JWT authentication. You must migrate any integration using JWT authentication to OAuth Server-to-Server credentials. During migration, subscription data is re-imported through the new connection. Software models remain in place, but linked user subscriptions are deleted and re-imported, resetting the reclamation candidate generation cycle. Default reclamation rules resolve automatically while custom reclamation rules may require reconfiguration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Adobe Cloud Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User subscription** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Adobe Cloud** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display name	Name of the Adobe Cloud integration profile.
Authentication type	Type of authentication to access Adobe Cloud APIs. Default value is OAuth 2.0.
Profile type	Type of integration profile. This field is automatically set to Adobe subscription.

3. In the Process configuration section, view the required user roles or API permissions to minimize security risks and optimize SaaS licenses.

Note:

The **Download subscriptions** check box is selected by default and you can't clear it.

For more information about the required roles and scopes, see Minimal user permissions table.

4. Select **Submit**.
The **Connection & Credential** field appears on the form and is automatically set to **sn_sam_saas_int.Adobe_OAuth**.
5. Select the preview icon beside the **Connection & Credential** field to open the Connection & Credential Aliases record.
6. Select the **Create New Connection & Credential** related link.
7. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a Connection and Credential form

Field	Description
Connection Name	Name of the Adobe Cloud connection.
Connection URL (Instance URL)	URL for the connection. This field is automatically set to `https://<Instance Name>.adobelogin.com`. For more information about the steps to get the URL, see Step 9 in Create a project and add APIs using OAuth.
OAuth Client ID	Client ID that you generated while creating an Adobe Cloud OAuth credential.
OAuth Client Secret	Client Secret that you retrieved while creating an Adobe Cloud OAuth credential.
OAuth Redirect URL	`https://<instance_name>/oauth_redirect.do`, where the instance name is the name of your ServiceNow instance.
Organization ID	Adobe Cloud Organization ID that you find while creating an Adobe Cloud OAuth credential.

8. Select **Create and Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

Result

Adobe subscription data is pulled into Software Asset Management when the *SAM - Import Adobe User Subscriptions* scheduled job runs. When the subscription data is pulled, the *SAM - Optimize Adobe Subscriptions* scheduled job runs monthly to optimize the Adobe Creative Cloud subscriptions. If complete subscription data isn't getting pulled accurately into the Software Asset Management application, see Determine and verify Adobe subscription information in your ServiceNow instance.

This job completion results in the following:

- An optimization candidate that consolidates three (configurable) or more Single App or individual product subscriptions and recommends Adobe Creative Cloud All Apps when it isn't installed.
- A reclamation candidate that reclaims Single App or individual product subscriptions with dual licenses when Adobe Creative Cloud All Apps is installed.

  Let's say, a user is subscribed to Adobe Creative Cloud All Apps and also consumes licenses for Single App or individual products such as Adobe Acrobat and Adobe Photoshop. In this dual license scenario, the Software Asset Management application recommends reclaiming the licenses for Single App or individual product subscriptions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- A reclamation candidate that reclaims three (configurable) or more Single App or individual product subscriptions that are actively used and an optimization candidate that recommends assigning Adobe Creative Cloud All Apps.

  Let's say, a user is subscribed to Adobe Acrobat, Adobe Illustrator, and Adobe Photoshop and uses all these products actively. In this scenario, the Software Asset Management application recommends reclaiming the licenses for these individual product subscriptions and recommends using Adobe Creative Cloud All Apps.

- A reclamation candidate that reclaims Adobe Creative Cloud All Apps when less than three (configurable) individual products are actively used and an optimization candidate that recommends assigning Single App or individual product subscriptions that are actively used.

  Let's say, a user is subscribed to Adobe Creative Cloud All Apps but is using less than three individual Creative Cloud products actively. In this scenario, the Software Asset Management application reclaims the Adobe Creative Cloud All Apps license and recommends assigning these individual product subscriptions that are actively used.

What to do next

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

View the subscription data by navigating to **All** > **SaaS License** > **All User Subscriptions**. You can check the status of the *SAM - Import Adobe User Subscriptions* job by navigating to **All** > **Software Asset** > **Administration** > **Job Results**.

You can also view information about your Adobe subscriptions, compliance, and costs on the Office 365 & Adobe Cloud dashboard in Software Asset Management classic.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

Related topics

Publisher optimizations for Adobe

Determine and verify Adobe subscription information in your ServiceNow instance

Determine the exact software subscription information to be pulled from the Adobe admin center and verify if the complete subscription information is pulled accurately to ServiceNow instance.

Before you begin

Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **License operations** > **User subscription** > **Direct integration profiles**.
2. Filter with the Adobe Cloud integration profile you created to determine the exact software subscription information to be pulled from Adobe admin center to ServiceNow instance. This subscription information includes all subscriptions available on the Adobe admin center.
3. Verify with the Adobe admin if complete subscription data isn't getting pulled accurately into Software Asset Management.

   Trouble?
   After the validation is successful, look for system logs for any possible errors:

   a. **Enable debug logs and re-run the job**: This action helps in capturing detailed information about the process. For more information, see Configure outbound logging.

   b. **Check outbound logs for API calls and responses**: If the API response isn't successful, check Adobe documentation for the specific error.

   c. **If the APIs were successful, review system logs**: Look for any technical failures or issues within the code itself.

Office 365 & Adobe Cloud dashboard in Software Asset Management classic

View compliance analysis results related to Microsoft Office 365 and Adobe Cloud License Management in Software Asset Management classic.

Note: The Office 365 & Adobe Cloud dashboard is no longer available for new Brazil users who have activated the Software Asset Management Professional (com.snc.samp) plugin or upgraded to Brazil without activating the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil.

- If you activated the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil but didn't activate the Workspace plugin (com.sn_sam_workspace), you have access to this dashboard.
- If you activated the Software Asset Workspace (sn_sam_workspace) store application after upgrading to Brazil, you won't be able to access this dashboard from the **Software Asset** navigation menu in your instance. You can however access this dashboard from the **Dashboards** navigation menu.

Access the dashboard by navigating to **All** > **Software Asset** > **Office 365 & Adobe Cloud**.

You can filter by **Subscription Software Models** or **Subscription Publisher** using filter lists.

Note: The Subscription Publisher filter list always includes Microsoft and Adobe even when only one subscription publisher pack is active.

The dashboard is updated whenever a new reconciliation result is available. You can save charts in PNG or JPG format.

Adobe

You can manage Adobe subscription information with Adobe I/O authentication integration.

Note: The add-on Adobe publisher pack (com.sn_samp_adobe) plugin must be installed to view Adobe subscription reporting.

Only Adobe software products that are recognized as subscription software are shown. Adobe integration must be set up to view compliance information.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- List of Active Subscriptions with no Active Adobe Software installs

  If a user has an active subscription but does not have any respective Adobe suite of products deployed.

  User Name | Email ID | Subscription Name | List of devices assigned to users.

- Optimization of Adobe install using SCCM metering data

  If user is underutilizing Adobe subscriptions

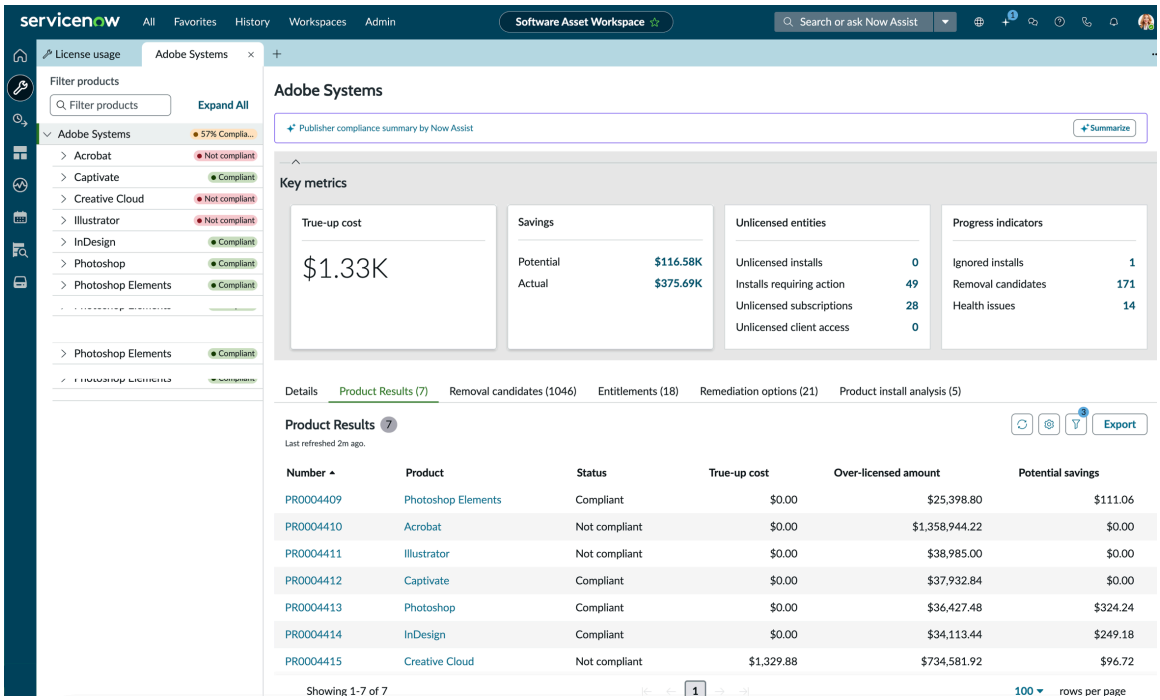
  User Name | Email ID | Subscription Name | Subscription Cost | List of devices assigned to users | List of Adobe suite of products | Last Access Time

Publisher overview for Adobe Systems in the Software Asset Workspace

View license usage information related to Adobe in the publisher overview for Adobe Systems in the Software Asset Workspace.

From the Software Asset Workspace, access the Adobe Systems publisher overview by navigating to **License usage** > **Publishers** and then selecting **Adobe Systems** from the list of available software publishers.

Results are updated whenever a new reconciliation result is available.



You can view a summary of your license usage information in the Summary section of the Adobe Systems publisher overview.

Adobe Systems Summary

Report	Description
True-up cost	Cost to be compliant based on the average price of rights in your Adobe software entitlements.
Potential savings	Potential cost savings for your Adobe licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Adobe Systems Summary (continued)

Report	Description
Actual savings	Actual cost savings for your Adobe licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information: • **Unlicensed installs**: Total number of unlicensed Adobe software installations. Select the number to view the complete list of unlicensed Adobe software installations. • **Installs requiring action**: Total number of Adobe software installations that you must take action on. Select the number to view the complete list of these Adobe software installations. • **Unlicensed subscriptions**: Total number of unlicensed Adobe subscriptions. Select the number to view the complete list of unlicensed Adobe subscriptions. • **Unlicensed client access**: Total number of unlicensed Adobe client access records. Select the number to view the complete list of unlicensed Adobe client access records.
Progress indicators	Summary of your license compliance progress. This summary includes the following indicators: • **Ignored installs**: Total number of Adobe software installations that were ignored during reclamation. Select the number to view the complete list of ignored Adobe software installations. • **Removal candidates**: Total number of Adobe removal candidates. Select the number to view the list of all software removal candidates.

For more details on the license usage information that is provided in the publisher overview, see License usage publisher fields in workspace.

Software Asset Management publisher pack for Citrix

Use the Citrix publisher pack for the optimization and reconciliation of your Citrix products. You can track licensing positions for your Citrix users and devices so that you can determine your license compliance.

To use the Citrix publisher pack, activate the Software Asset Management Professional for Citrix plugin (com.sn_samp_citrix). For details, see Request Software Asset Management.

The Citrix publisher pack supports Virtual Applications products (formerly XenApp) and Virtual Desktop products (formerly XenDesktop). Using this publisher pack, you can manage licenses and determine the license compliance for your Citrix products. You can gain visibility into the third-party applications that are delivered through your virtual applications and desktops. You can also gain visibility into the users that may potentially access those applications.

Use the ServiceNow® Discovery application to collect data from Citrix. The license consumption data for your Citrix products is collected from the Citrix License Server.

Discovery uses OData APIs to identify the third-party applications that are delivered through your Citrix farm from the Citrix Delivery Controller. Use this information to create software installation records and track license usage for these applications. To identify these applications, admins must create a Discovery schedule to run on the Citrix discovery pattern. See Citrix License

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Server and Delivery Controller discovery for more details on the Citrix discovery pattern and tables.

Citrix licensing models

The Citrix publisher pack supports the following Citrix licensing models:

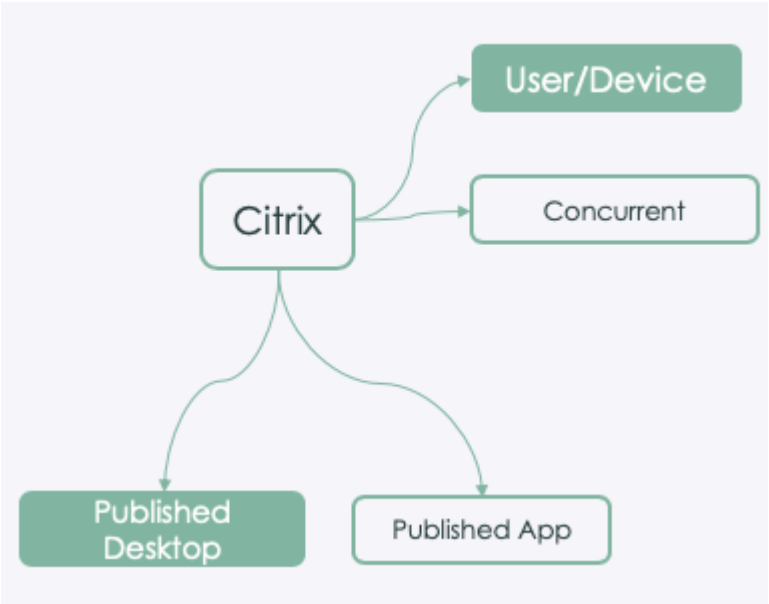
Concurrent licensing model

Concurrent licenses are used only during active sessions. When a user begins a session, the application or desktop checks out a license for the device that is running the session. When the session disconnects or ends, the application or desktop checks the license back in to make the license available to other users and devices. Concurrent licenses enable either one connection to a virtual desktop or unlimited applications for any user or device. License consumption is based on the number of licenses being used.

User/Device licensing model

User/Device licensing model: User/Device licenses are assigned to either a user or shared device. If the Citrix License Server assigns a license to a user, that user can make unlimited connections from unlimited devices. If the Citrix License Server assigns a license to a device, unlimited users can make unlimited connections from that device. License consumption is based on the user or device using the license.

The architecture for Citrix licenses is shown in the following figure:



Licensing for third-party applications that are delivered through Citrix virtualization technologies is based on potential access. Any user or device can consume a license as long as they have the potential to access an application or desktop deployed in a virtual Citrix environment. You can control access to these applications and desktops by using Delivery Groups and Application Groups:

Delivery Groups

Delivery Groups are collections of devices on which you can use Citrix applications or desktops. Each Delivery Group specifies the users that have access to those devices. In addition, Delivery Groups specify the applications or desktops that are available to those users.

Application Groups

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Application Groups are collections of applications that are shared across Delivery Groups or subsets of Delivery Group users. Each Application Group specifies the users or Active Directory (AD) groups that have access to those applications.

Refer to the Citrix product documentation for more information on Citrix deployment guidelines and recommendations. Use this information to determine whether you should map your users at the Delivery Group level or at the Application Group level. If you map users at both levels, Software Asset Management considers mappings at only the Application Group level.

You can view your Citrix license usage data from the Software Publisher Analytics dashboard for Citrix. Use this data to optimize your license position by reclaiming any unused or unauthorized licenses.

Create entitlements for Citrix

Software entitlements enable you to define license details that are matched to software models. You can add an entitlement individually or import a list from a spreadsheet.

Before you begin

Role required: sam_user or sam_admin. The sam_admin role is required to import entitlements.

Important: You can create and import entitlements in both the Software Asset Management classic application and the Software Asset Workspace. The following steps provide details on how to create entitlements in the Software Asset Management classic application. For details on how to create entitlements in the Software Asset Workspace, see Create entitlements in workspace. For details on how to import entitlements in the Software Asset Workspace, see Import bulk entitlements in workspace.

Before you can create a software entitlement, create a software model.

About this task

Manage available software and tie software installations (software being used) with entitlements (software owned) using software models. Create software models for all software to be monitored.

Note: Users with the model_manager role can navigate to **Product Catalog** > **Product Model** > **Software Models** but can't administer all aspects of software models.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **Software Entitlement** and select **New**.

   For a detailed description of the fields related to all entitlements, see Create entitlements in Software Asset Management classic.

   ### Software Entitlement form

Field	Description
License Metric	License metric for the license group that the software license is counted against when reconciliation is run. For detailed of the license metrics, see Software license metrics.

2. To set upgrade or downgrade entitlements, select the new software entitlement record from the Software Entitlements list.
   For a detailed description on how to complete additional configurations for software entitlements, see Create entitlements in Software Asset Management classic.
3. Select **Submit**.
   Your entitlement is added to the software entitlements list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

Run software reconciliation on your licenses.

Software Publisher Analytics dashboard for Citrix in Software Asset Management classic

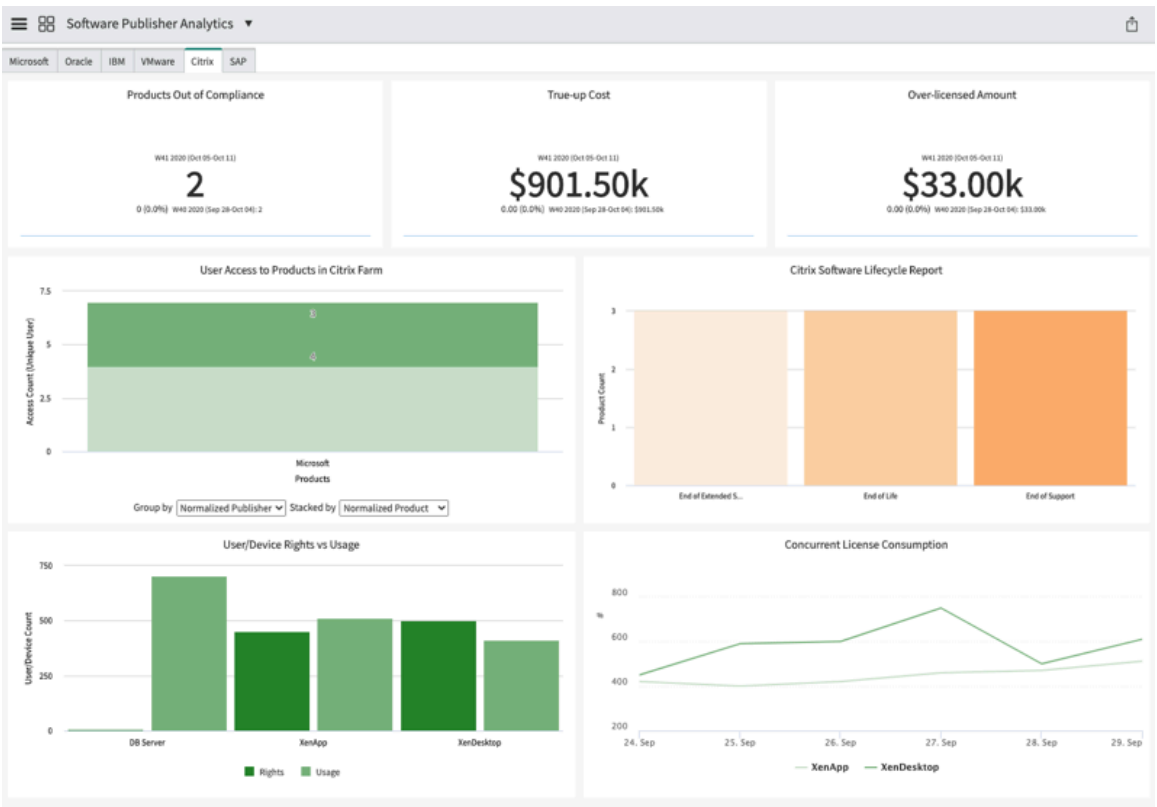
View compliance analysis results for Citrix on the Software Publisher Analytics dashboard in the Software Asset Management classic application.

Access the Software Publisher Analytics dashboard by navigating to **All** > **Software Asset** > **Publisher Overview**.

Note: The add-on Citrix publisher pack (com.sn_samp_citrix) plugin must be installed to view the Citrix dashboard tab.

A discovery process is required for Citrix data to be collected. For ServiceNow Discovery, a user with the admin role must create a Discovery schedule to run on the Citrix Delivery Controller for communication with the Citrix License Server.

The dashboard is updated whenever a new reconciliation result is available. You can save charts in PNG or JPG format.



Citrix tab

Report	Source list	Description
True-up Cost	Product Results	Cost to be compliant based on the average prices for entitlements for the rights.
Products out of Compliance	Product Results	Number of products that have at least one software model out of compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Citrix tab (continued)

Report	Source list	Description
		Select the report to view the results in the License Workbench.
Over-Licensed Amount	Product Results	Cost of licenses owned but not being used.
User Access to Products in Citrix Farm	Software Installations	Number of users with access to the Citrix farms.
Citrix Software Lifecycle Report	Software Lifecycle Report	Number of products in each software lifecycle phase, including End of Extended Support, End of Life, and End of Support.
User/Device Rights vs Usage Software Installs in Citrix Farm	Software Installations	Number of User/Device rights owned versus the number of rights being consumed.
Concurrent License Consumption Trend	License Consumption History	License consumption trends for your Citrix software products. Each data point represents the maximum in-use license count per day. Select a data point to view additional license consumption data for a specific Citrix software product.

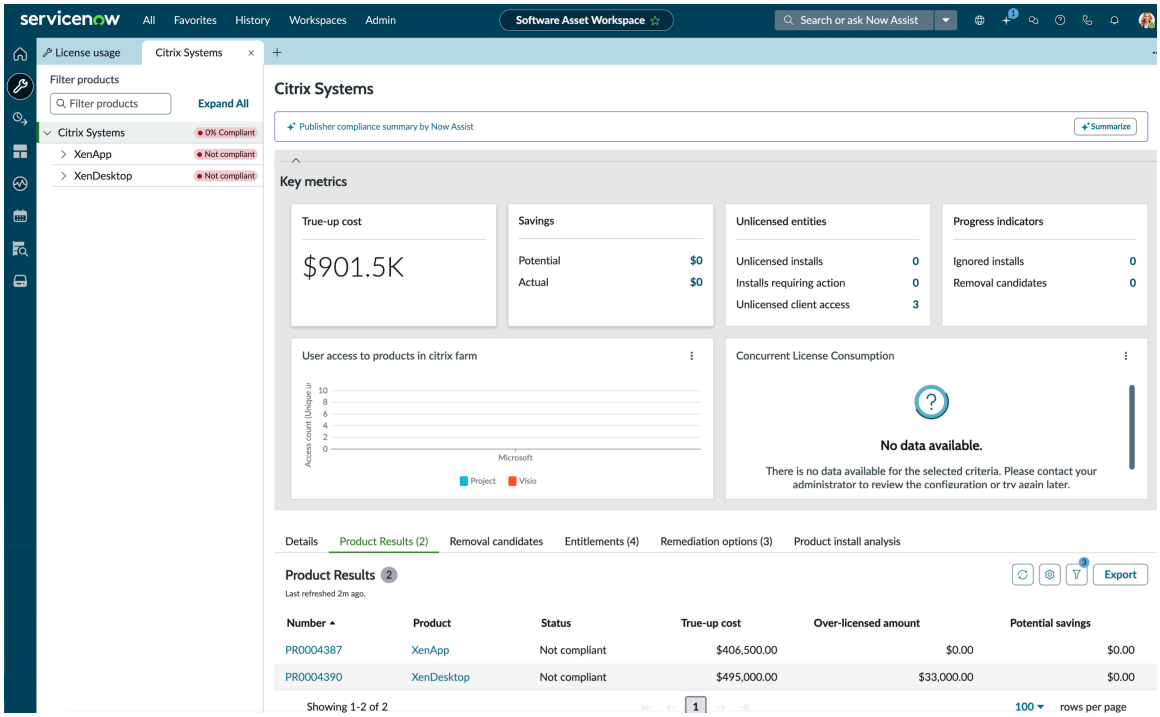
Publisher overview for Citrix Systems in the Software Asset Workspace

View license usage information related to Citrix in the publisher overview for Citrix Systems in the Software Asset Workspace.

From the Software Asset Workspace, access the Citrix Systems publisher overview by navigating to **License usage** > **Publishers** and then selecting **Citrix Systems** from the list of available software publishers.

Results are updated whenever a new reconciliation result is available.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



You can view a summary of your license usage information in the Summary section of the Citrix Systems publisher overview.

Citrix Systems Summary

Report	Description
True-up cost	Cost to be compliant based on the average price of rights in your Citrix software entitlements.
Potential savings	Potential cost savings for your Citrix licenses.
Actual savings	Actual cost savings for your Citrix licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information: • **Unlicensed installs**: Total number of unlicensed Citrix software installations. Select the number to view the complete list of unlicensed Citrix software installations. • **Installs requiring action**: Total number of Citrix software installations that you must take action on. Select the number to view the complete list of these Citrix software installations. • **Unlicensed client access**: Total number of unlicensed Citrix client access records. Select the number to view the complete list of unlicensed Citrix client access records.
Progress indicators	Summary of your license compliance progress. This summary includes the following indicators:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Citrix Systems Summary (continued)

Report	Description
	• **Ignored installs**: Total number of Citrix software installations that were ignored during reclamation. Select the number to view the complete list of ignored Citrix software installations. • **Removal candidates**: Total number of Citrix removal candidates. Select the number to view the list of all software removal candidates.
User access to products in citrix farm	Number of users that have access to specific software products within your Citrix farm. Select a bar to view the complete list of users that have access to the specified software product.
Concurrent License Consumption	License consumption trends for your Citrix software products. Each data point represents the maximum in-use license count per day. Select a data point to view additional license consumption data for a specific Citrix software product.

For more details on the license usage information that is provided in the publisher overview, see License usage publisher fields in workspace.

Software Asset Management publisher pack for IBM

Use the Software Asset Management publisher pack for IBM to track and optimize licensing for your IBM software products. You can also use the publisher pack to track and optimize licensing for the Red Hat Enterprise Linux Server and Red Hat Enterprise Linux for Virtual Datacenters products.

To use the IBM publisher pack, activate the Software Asset Management Professional for IBM (com.sn_samp_ibm) plugin.

The IBM publisher pack supports the following license metrics:

- Authorized User
- Authorized User Value Unit
- Employee User Value Unit
- External User Value Unit
- Per Device
- Per Named User
- Per Processor
- Per User
- Processor Value Unit (PVU)
- Resource Value Unit (RVU)
- Virtual Processor Core (VPC)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: The PVU, RVU, and VPC license metrics are supported only if you integrate the IBM publisher pack with the IBM License Metric Tool (ILMT), BigFix Inventory, or a Software Asset Management provider that is authorized to participate in the IBM Client Value Acceleration (CVA) Program. For more information on ILMT and BigFix Inventory integrations, see IBM License Metric Tool (ILMT) and BigFix Inventory integrations. For more information on Authorized SAM Provider (ASP) integrations, see Client Value Acceleration (CVA) integrations for IBM.

For more information on the supported IBM license metrics, see Software license metrics.

Important: The IBM publisher pack is available as part of the Software Asset Management Professional (com.snc.samp) plugin. The publisher pack includes all capabilities that are required for tracking and managing both full capacity and sub-capacity PVU and RVU licenses for your IBM products. It does not require the legacy IBM PVU Process Pack to track and manage IBM PVU licenses. See iBM PVU Process Pack for more information on the legacy process pack.

When you run a discovery using a discovery tool such as the ServiceNow Discovery application, the discovery tool locates the IBM software installations in your environment and then imports the associated data into your ServiceNow instance. The Software Asset Management application compares this data against your IBM software entitlements to automatically reconcile your IBM software products, including products in complex server licensing scenarios.

Important: You must use different discovery tools based on the license metric that you are using for reconciliation, and if applicable, the type of IBM integration that you are using with the publisher pack:

PVU and RVU license metrics

To reconcile your IBM software products using the PVU or RVU license metrics, you must use one of the following discovery tools:

- If you are integrating with the ILMT or BigFix Inventory, you must connect to these discovery tools using either version 1 or version 2 of the integration APIs.
- If you are integrating with a Software Asset Management provider that is authorized to participate in the IBM CVA Program, you must use the ServiceNow Discovery application in conjunction with the IBM License Compliance for Software Asset Management application.

VPC license metric

To reconcile your IBM software products using the VPC license metric, you must use one of the following discovery tools:

- If you are integrating with the ILMT or BigFix Inventory, you must connect to these discovery tools using version 2 of the integration APIs.
- If you are integrating with a Software Asset Management provider that is authorized to participate in the IBM CVA Program, you must use the ServiceNow Discovery application in conjunction with the IBM License Compliance for Software Asset Management application.

All other supported license metrics

To reconcile your IBM software products using any other supported license metric, including user-based license metrics like Authorized User and External User Value Unit, you can use any other discovery tool.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Supported IBM license types

The Software Asset Management publisher pack for IBM adds license metrics for various IBM license types.

IBM processor value unit (PVU) and resource value unit (RVU) licenses

If you integrate the Software Asset Management publisher pack for IBM with Software Asset Management providers that are authorized to participate in the IBM Client Value Acceleration (CVA) Program, you can track and manage IBM PVU and RVU licenses. Alternatively, you can track and manage these licenses when you integrate with the IBM License Metric Tool (ILMT) or BigFix Inventory using version 1 or 2 of the integration APIs.

With these integrations, the publisher pack adds the Processor Value Unit (PVU) and Resource Value Unit (RVU) license metrics for IBM so that you can calculate licensing for these license types. For more details on Authorized SAM Provider (ASP) integrations, see Client Value Acceleration (CVA) integrations for IBM. For more details on ILMT and BigFix Inventory integrations, see IBM License Metric Tool (ILMT) and BigFix Inventory integrations.

Note: IBM PVU and RVU licensing is supported in both physical and virtualized environments.

Processor value unit (PVU) licensing

A processor value unit (PVU) is a unit of measure that enables you to determine the licensing requirements for an IBM software product based on the processor technology that is used in your physical hardware environment. Each processor technology is assigned a PVUs per Core value based on the processor vendor, processor name, and model number. You can determine the number of rights that are required for a PVU license by multiplying the appropriate PVUs per Core value by the number of activated processor cores in the physical hardware environment that is available to or managed by your IBM software product.

The IBM publisher pack supports both full capacity and sub-capacity PVU licensing. If you are using a full capacity PVU license, you must account for all activated processor cores in the physical hardware environment that is available to or managed by the IBM software product. If you are using a sub-capacity PVU license, you must account for only the specific activated processor cores that are available to or managed by the IBM software product, as defined in Virtualization Capacity License Counting Rules.

You can gain visibility into how your PVU licenses are applied to your devices by using the **Usage Type** field in the license workbench. Use this information to determine whether your PVU licenses are applied to the full capacity or sub-capacity of each device. Depending on the type of IBM integration that you are using, specify how a PVU license is applied to a device using one of the following options:

- If you are integrating the IBM publisher pack with the IBM License Metric Tool (ILMT) or BigFix Inventory, navigate to **Integration - ILMT/BigFix Inventory** > **Import Set Data** > **IBM License Metric Peak Usage** to modify the value of the corresponding **Usage Type** field in the IBM Peak Consumption [samp_ilmt_sw_install] table. By default, the **Usage Type** field for devices on the IBM Peak Consumption [samp_ilmt_sw_install] table is automatically set to **Sub-capacity**. However, the **Usage Type** field for devices with allocations in your full capacity PVU entitlements is automatically set to **Full capacity** instead.

  For more details on ILMT and BigFix Inventory, see IBM License Metric Tool (ILMT) and BigFix Inventory integrations.

- If you are integrating the IBM publisher pack with an Authorized SAM Provider (ASP), navigate to **Workspaces** > **Software Asset Workspace**. When the Software Asset Workspace

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

launches, open the License operations view. From the left navigation menu of the License operations view, navigate to **IBM ASP Integration** > **Device Settings** to modify the value of the corresponding **Usage Type** field. By default, the **Usage Type** field is automatically set to **Sub-capacity**. However, the **Usage Type** field for devices with allocations in your full capacity PVU entitlements is automatically set to **Full capacity** instead.

For more details on the available device settings, see Verify the meta data for your IBM hosts.

For more details on ASPs, see Client Value Acceleration (CVA) integrations for IBM.

Refer to Processor Value Units (PVU) for more information on IBM PVU licensing, including the complete list of supported processor technologies and corresponding PVUs per Core values.

Resource value unit (RVU) licensing

A resource value unit (RVU) is a unit of measure that enables you to determine the licensing requirements for an IBM software product based on the number of activated processor cores that are available to or managed by that product. The number of activated processor cores corresponds directly with an RVU tier number and factor value.

RVU tiers and factors

Number of Activated Processor Cores	Tier	Factor
0 to 2,500	1	1.00
2,501 to 10,000	2	0.80
10,001 to 50,000	3	0.60
50,001 to 150,000	4	0.40
150,001 and above	5	0.20

You can determine the number of rights that are required for an RVU license by using a step function based on these RVU tiers. First, you must divide the total number of activated processor cores into tiers based on the RVU tiers and factors table. Since RVU licensing is calculated at the product level and not the individual device level, you must account for all devices that the product is installed on when determining the total number of activated processor cores that must be licensed. Then, you must multiply the number of activated processor cores within each tier by the corresponding factor values. Finally, you must add the resulting numbers together to determine the total number of rights that are required for the RVU license.

Important: If you do not have enough rights to license all activated processor cores across all devices, none of the devices are licensed and the product is marked as Not Compliant.

For example, a product has access to a total of 150,000 activated processor cores across 100 devices. The total number of rights that are required for the RVU license is 72,500, based on the following calculations:

Tier	Number of Activated Processor Cores within the Tier	Factor	Number of Rights Required
1	2,500	1.00	2,500 x 1.00 = 2,500

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tier	Number of Activated Processor Cores within the Tier	Factor	Number of Rights Required
(0 to 2,500 activated processor cores)			
2 (2,501 to 10,000 activated processor cores)	7,500	0.80	7,500 x 0.80 = 6,000
3 (10,001 to 50,000 activated processor cores)	40,000	0.60	40,000 x 0.60 = 24,000
4 (50,001 to 150,000 activated processor cores)	100,000	0.40	100,000 x 0.40 = 40,000
n/a	150,000 total	n/a	2,500 + 6,000 + 24,000 + 40,000 = 72,500 total

Note: The number of rights that are consumed for RVU licenses is reported differently from the number of rights that are consumed for PVU licenses. For PVU licenses, this number is reported at the individual device level. For RVU licenses, this number is reported at the product level.

Refer to Resource value unit (RVU MAPC) for more information on IBM RVU tiers.

The IBM publisher pack supports both full capacity and sub-capacity RVU licensing. If you are using a full capacity RVU license, you must account for all activated processor cores in the physical hardware environment that is available to or managed by the IBM software product. If you are using a sub-capacity RVU license, which is available only in virtualized environments, you must account for only the activated processor cores that are used by the virtual machines (VMs) on which the IBM software product is installed.

You can gain visibility into how your RVU licenses are applied to your devices by using the **Usage Type** field in the license workbench. Use this information to determine whether your RVU licenses are applied to the full capacity or sub-capacity of each device. Depending on the type of IBM integration that you are using, specify how an RVU license is applied to a device using one of the following options:

- If you are integrating the IBM publisher pack with the IBM License Metric Tool (ILMT) or BigFix Inventory, navigate to **Integration - ILMT/BigFix Inventory** > **Import Set Data** > **IBM License Metric Peak Usage** to modify the value of the corresponding **Usage Type** field in the IBM Peak Consumption [samp_ilmt_sw_install] table. By default, the **Usage Type** field for devices on the IBM Peak Consumption [samp_ilmt_sw_install] table is automatically set to **Sub-capacity**.

  For more details on ILMT and BigFix Inventory, see IBM License Metric Tool (ILMT) and BigFix Inventory integrations.

- If you are integrating the IBM publisher pack with an Authorized SAM Provider (ASP), such as Anglepoint, navigate to **Workspaces** > **Software Asset Workspace**. When the Software Asset Workspace launches, open the License operations view. From the left navigation menu of the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License operations view, navigate to **IBM ASP Integration** > **Device settings** to modify the value of the corresponding **Usage Type** field. By default, the **Usage Type** field is automatically set to **Sub-capacity**.

For more details on the available device settings, see Verify the meta data for your IBM hosts.

For more details on ASPs, see Client Value Acceleration (CVA) integrations for IBM.

IBM user-based licenses

You can use the Software Asset Management publisher pack for IBM to track and manage your IBM user-based licenses, including authorized user licenses and user value unit (UVU)-based licenses.

Supported UVU-based licenses include authorized UVU, employee UVU, and external UVU. The publisher pack adds license metrics that are specific to IBM so that you can calculate licensing for these license types.

IBM user-based licensing enables you to license the users who require access to your IBM software products. You can track and optimize the compliance of your IBM user-based licenses by reconciling the associated IBM software products through client access records. With a client access record, you can specify the total number of users who are granted access to a particular version of an IBM software product. For more granular control, you can also identify the specific users who are granted access to that product. The Software Asset Management application can then compare this information against the software rights and allocations that are defined in the corresponding software entitlements to determine if the associated user-based licenses are compliant.

For more information on client access records in the Software Asset Workspace, see Create a software client access record in workspace. For more information on client access records in the Software Asset Management classic application, see Add a software client access record in Software Asset Management classic.

Authorized user licensing

Authorized user licensing enables you to license each unique user who requires access to an IBM software product.

With this licensing type, you can install a given IBM software product on an unlimited number of configuration items (CIs), such as servers and computers. Each user can then access an unlimited number of installations for that software product on any of the CIs that the software product is installed on.

Authorized user value unit (AUVU) licensing

Authorized user value unit (AUVU) licensing enables you to license the total number of unique users who require access to an IBM software product.

With this licensing type, you can install a given IBM software product on an unlimited number of configuration items (CIs), such as servers and computers. Each user can then access an unlimited number of installations for that software product on any of the CIs that the software product is installed on.

With AUVU licensing, the number of users who require access to an IBM software product corresponds directly with an AUVU tier number and factor value.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AUVU tiers and factors

Number of Users	Tier	Factor
1 to 20	1	1.00
21 to 50	2	0.83
51 or more	3	0.80

You can determine the number of rights that are required for an AUVU license by using a step function based on these AUVU tiers. First, divide the total number of users into tiers based on the AUVU tiers and factors table. Then, multiply the number of users within each tier by the corresponding factor values. Finally, add the resulting numbers together to determine the total number of rights that are required for the AUVU license.

Important: If you do not have enough rights to license all users, none of the users are licensed and the product is marked as Not Compliant.

For example, a company wants to grant 150 employees and contractors access to an IBM software product so that they can collaborate on an upcoming project. The total number of rights that are required for the corresponding AUVU license is 125, based on the following calculations:

Tier	Number of Users within the Tier	Factor	Number of Rights Required
1 (1 to 20 users)	20	1.00	20 x 1.00 = 20
2 (21 to 50 users)	30	0.83	30 x 0.83 = 24.9
3 (51 or more users)	100	0.80	100 x 0.8 = 80
—	150 total	—	20 + 24.9 + 80 = 124.9 total (rounded up to 125 total)

Employee user value unit (EUVU) licensing

Employee user value unit (EUVU) licensing enables you to license the total number of users within your organization who require access to an IBM software product. These users can include both employees and contractors.

With EUVU licensing, the number of users who require access to an IBM software product corresponds directly with an EUVU tier number and factor value.

EUVU tiers and factors

Number of Users	Tier	Factor
1000 to 2,500	1	1.000

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

EUVU tiers and factors (continued)

Number of Users	Tier	Factor
2,501 to 5,000	2	0.800
5,001 to 10,000	3	0.700
10,001 to 30,000	4	0.650
30,001 to 50,000	5	0.550
50,001 to 100,000	6	0.500
100,001 to 300,000	7	0.465
300,001 to 500,000	8	0.400
500,001 to 1,000,000	9	0.360
1,000,001 to 100,000,000	10	0.320

You can determine the number of rights that are required for an EUVU license by using a step function based on these EUVU tiers. First, divide the total number of users into tiers based on the EUVU tiers and factors table. Then, multiply the number of users within each tier by the corresponding factor values. Finally, add the resulting numbers together to determine the total number of rights that are required for the EUVU license.

Important: If you do not have enough rights to license all users, none of the users are licensed and the product is marked as Not Compliant.

For example, a company wants to grant 11,000 employees access to an IBM software product. The total number of rights that are required for the corresponding EUVU license is 8,650, based on the following calculations:

Tier	Number of Users within the Tier	Factor	Number of Rights Required
1 (1,000 to 2,500 users)	2,500	1.000	2,500 x 1.000 = 2,500
2 (2,501 to 5,000 users)	2,500	0.800	2,500 x 0.800 = 2,000
3 (5,001 to 10,000 users)	5,000	0.700	5,000 x 0.700 = 3,500
4 (10,001 to 30,000 users)	1,000	0.650	1,000 x 0.650 = 650
—	11,000 total	—	2,500 + 2,000 + 3,500 + 650 = 8,650 total

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

External user value unit (XUVU) licensing

External user value unit (XUVU) licensing enables you to license the total number of users outside your organization who require access to an IBM software product. These users can include third-party partners, suppliers, and contractors.

With XUVU licensing, the number of users who require access to an IBM software product corresponds directly with an XUVU tier number and factor value.

XUVU tiers and factors

Number of Users	Tier	Factor
1000 to 10,000	1	1.00000
10,001 to 50,000	2	0.87500
50,001 to 100,000	3	0.60000
100,001 to 500,000	4	0.43750
500,001 to 1,000,000	5	0.30000
1,000,001 to 25,000,000	6	0.24375
25,000,001 to 50,000,000	7	0.15000
50,000,001 to 250,000,000	8	0.13750
250,000,001 to 500,000,000	9	0.05000
500,000,001 to 100,000,000,000	10	0.05000

You can determine the number of rights that are required for an XUVU license by using a step function based on these XUVU tiers. First, divide the total number of users into tiers based on the XUVU tiers and factors table. Then, multiply the number of users within each tier by the corresponding factor values. Finally, add the resulting numbers together to determine the total number of rights that are required for the XUVU license.

Important: If you do not have enough rights to license all users, none of the users are licensed and the product is marked as Not Compliant.

For example, a company wants to grant 15,000 third-party partners access to an IBM software product. The total number of rights that are required for the corresponding XUVU license is 14,375, based on the following calculations:

Tier	Number of Users within the Tier	Factor	Number of Rights Required
1 (1,000 to 10,000 users)	10,000	1.00000	10,000 x 1.00000 = 10,000
2 (10,001 to 50,000 users)	5,000	0.87500	5,000 x 0.87500 = 4,375
—	15,000 total	—	10,000 + 4,357 = 14,375 total

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

IBM virtual processor core (VPC) licenses

If you integrate the Software Asset Management publisher pack for IBM with Software Asset Management providers that are authorized to participate in the IBM Client Value Acceleration (CVA) Program, you can track and manage IBM VPC licenses. Alternatively, you can track and manage these licenses when you integrate with the IBM License Metric Tool (ILMT) or BigFix Inventory using version 2 of the integration APIs.

With these integrations, the publisher pack adds the Virtual Processor Core (VPC) license metric for IBM so that you can calculate licensing for this license type. For more details on Authorized SAM Provider (ASP) integrations, see Client Value Acceleration (CVA) integrations for IBM. For more details on ILMT and BigFix Inventory integrations, see IBM License Metric Tool (ILMT) and BigFix Inventory integrations.

A virtual processor core (VPC) is a unit of measure that enables you to determine the licensing requirements for an IBM software product based on the number of cores that are available to or managed by that product. If you are licensing a virtual machine (VM), VPC is based on the number of virtual cores that are assigned to the VM. If you are licensing a physical host that is not partitioned for VMs, VPC is based on the number of processor cores on the host. Each VPC license requires one right for every core that is available to or managed by the associated IBM software product.

If you are integrating the IBM publisher pack with an ASP, the publisher pack supports both full capacity and sub-capacity VPC licensing. If you are integrating with ILMT or BigFix Inventory, the publisher pack supports only sub-capacity VPC licensing. With a full capacity VPC license, you must account for all processor cores on the physical host that is available to or managed by the IBM software product. With a sub-capacity VPC license, which is available only in virtual environments, you must account for only the virtual cores that are assigned to the VMs on which the IBM software product is installed and running.

You can gain visibility into how your VPC licenses are applied to your devices by using the **Usage Type** field in the license workbench. Use this information to determine whether your VPC licenses are applied to the full capacity or sub-capacity of each device. If you are integrating with an ASP, you can specify how a VPC license is applied to a device by navigating to **Workspaces** > **Software Asset Workspace**. When the Software Asset Workspace launches, open the License operations view. From the left navigation menu of the License operations view, navigate to **IBM ASP Integration** > **Device Settings** to modify the value of the corresponding **Usage Type** field. By default, the **Usage Type** field is automatically set to **Sub-capacity**.

For more details on the available device settings, see Verify the meta data for your IBM hosts.

IBM License Metric Tool (ILMT) and BigFix Inventory integrations

You can use an IBM License Metric Tool (ILMT) or BigFix Inventory integration to create a connection between your IBM servers and the ServiceNow AI Platform. Use this connection to import data into your ServiceNow instance so that you can track and optimize licensing for your IBM software products.

You can integrate with ILMT or BigFix Inventory using either version 1 or version 2 of the ILMT and BigFix Inventory integration APIs. The Software Asset Management application uses these APIs to retrieve data, such as software installation data and peak usage data, from the ILMT or BigFix Inventory. For more information on integrating with ILMT or BigFix Inventory using version 1 of the APIs, see Integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory using v1 APIs. For more information on integrating with ILMT or BigFix Inventory using version 2 of the APIs, see Integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory using v2 APIs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

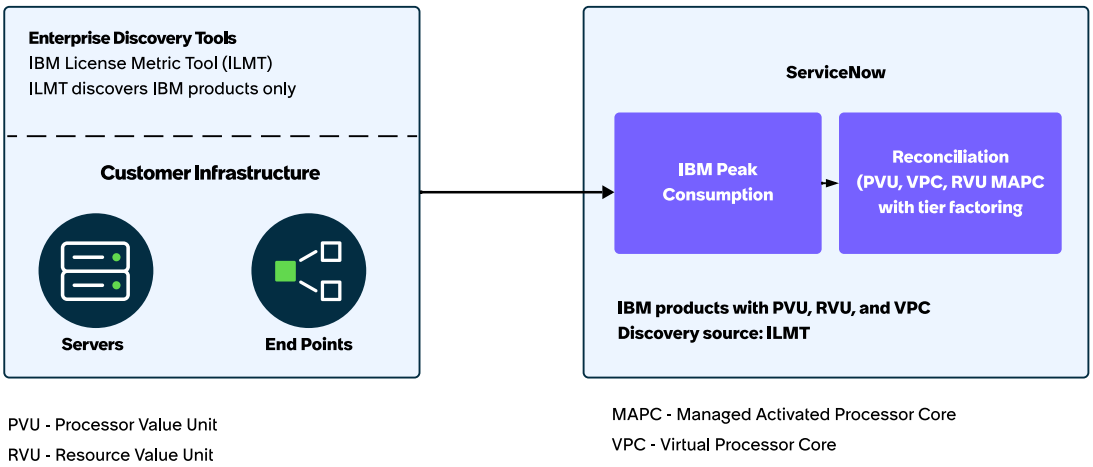
Important: Version 1 of the ILMT and BigFix Inventory integration APIs have been deprecated by IBM. However, the Software Asset Management application continues to support integrations that are using this version of the APIs. If you are setting up an ILMT or BigFix Inventory integration for the first time, use version 2 of the APIs instead. For more information on the deprecation of these APIs, see Deprecated REST APIs.

Integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory using v2 APIs

You can use version 2 of the IBM License Metric Tool (ILMT) and BigFix Inventory integration APIs to create a connection between your IBM servers and the ServiceNow AI Platform.

This connection enables you to import usage data into your ServiceNow instance so that you can track and optimize full capacity and sub-capacity processor value unit (PVU) and resource value unit (RVU) licensing as well as sub-capacity virtual processor core (VPC) licensing for your IBM software products.

See REST API resources and HTTP methods for more information on the ILMT and BigFix Inventory integration APIs.



The ILMT and BigFix Inventory integration enables you to create connections between one or more IBM servers and the ServiceNow AI Platform using HTTP or HTTPS. When you initiate the integration, you receive an IBM Server connection alias that you can use to set up your IBM server connections. If a connection is successful, the Software Asset Management application retrieves peak usage data within the aggregated period that you defined in ILMT or BigFix Inventory.

Prerequisites

To track your IBM full capacity and sub-capacity PVU, RVU, and VPC licenses using this integration, you must complete the following prerequisites:

- Install, set up, and run ILMT or BigFix Inventory on a physical host or virtual machine (VM).

  Important: When you are setting up ILMT, ensure that all required configuration item (CI) data, including serial numbers, names, and IP addresses, is configured correctly so that your ServiceNow instance can accurately create corresponding CI records in the Configuration Management Database (CMDB). Refer to KB0691430 for more details.

- Install ILMT version 9.2.24 or later.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If you are using ILMT version 9.2.23 or earlier, you can import usage data only against your discovered IBM software products and not against the hosts that are running those products.

- Configure your IBM ILMT agents to scan your physical hosts or VMs in compliance with IBM usage measurement guidelines.

  Note: Refer to Measuring License Use for more information on IBM usage measurement guidelines.

- Enable ILMT or BigFix Inventory to discover the configurations of both physical hosts and VMs as well as the relationships between them.
- Classify and bundle IBM components into IBM products through ILMT or BigFix Inventory.
- Request and install the IBM License Compliance for Software Asset Management application from the ServiceNow® Store. See Request the IBM License Compliance for Software Asset Management application for IBM License Metric Tool (ILMT) and BigFix Inventory integrations for detailed instructions.
- Set the **Connect to ILMT using** (*sn_samp_ibm_lic.ilmt_api_version*) Software Asset Management property to **v2 API's**. For more details on this property, see Software Asset Management properties.

Request the IBM License Compliance for Software Asset Management application for IBM License Metric Tool (ILMT) and BigFix Inventory integrations

If you are using version 2 of the IBM License Metric Tool (ILMT) and BigFix Inventory integration APIs to integrate with ILMT or BigFix Inventory, request the IBM License Compliance for Software Asset Management application from the ServiceNow® Store. Use the integration to track and manage your IBM licenses.

Before you begin

Role required: admin

Procedure

1. From a web browser, go to the ServiceNow Store.
2. Log in using your HI credentials.
3. In the search bar, enter `IBM License Compliance for Software Asset Management` and then select **Search**.
4. Select the result called **IBM License Compliance for Software Asset Management**.
5. On the IBM License Compliance for Software Asset Management page, select **Request Install**. The ServiceNow Request for App Installation - IBM License Compliance for Software Asset Management dialog box opens.
6. In the dialog box, fill in the fields.

ServiceNow Request for App Installation - IBM License Compliance for Software Asset Management dialog box

Field	Description
Instance Name	Name of the instance on which you want to install the application. After you enter the instance name, select **Validate Instance** to verify that the instance exists.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Reason for request	Reason for requesting the application.

7. Select **Request**.
8. Select **Close**.

Result
If your request is approved, you will receive an email with detailed instructions on how to install the application.

What to do next
Install the application according to the instructions in the email.

Transform maps for IBM License Metric Tool (ILMT) and BigFix Inventory integration v2 APIs

When you import data from the IBM License Metric Tool (ILMT) or BigFix Inventory using version 2 of the ILMT and BigFix Inventory integration APIs, your ServiceNow instance uses a default transform map to process this data into ServiceNow tables.

Default ILMT and BigFix Inventory transform map

By default, the ServiceNow AI Platform provides the ILMT Software License Usage transform map to process the IBM license usage data that you import using version 2 of the ILMT and BigFix Inventory integration APIs. When you import this data into your ServiceNow instance, it is added to the source ILMT Product Usage Staging [ilmt_v2_product_usage_staging] and ILMT Device Usage Staging [ilmt_v2_device_usage_staging] tables. The ILMT Software License Usage transform map then uses the following table mappings to map the data from these source tables to the corresponding target tables:

ILMT Software License Usage transform map table mappings

Source Table	Target Table
ILMT Product Usage Staging [ilmt_v2_product_usage_staging] **Note:** Data that is imported into this table is reported against your discovered IBM software products.	ILMT Product Usage [ilmt_v2_product_usage]
ILMT Device Usage Staging [ilmt_v2_device_usage_staging] **Note:** Data that is imported into this table is reported against the hosts that are running your IBM software products. **Note:** You can import data into this table only if you are using ILMT version 9.2.24 or later. You cannot import data into this table if you are using ILMT version 9.2.23 or earlier or if you are using BigFix Inventory.	ILMT Product Usage Per Server [ilmt_v2_usage_per_server] ILMT Discovered Computer [ilmt_discovered_computer]

After the data is successfully mapped, it is updated in the corresponding target table records. You can then use the updated target table data to reconcile your IBM software products and verify compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ILMT and BigFix Inventory data processing

The ILMT Software License Usage transform map processes data by using the onStart transform map script. The onStart transform map script is an event script that processes at the beginning of an import. For more information on this transform map script, see Map with transformation event scripts.

View the peak usage of your IBM software products

If you are integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory using version 2 of the ILMT and BigFix Inventory integration APIs, view the highest full capacity and sub-capacity Processor Value Unit (PVU), Resource Value Unit (RVU), and Virtual Processor Core (VPC) usage for your IBM software products within an aggregated time period of up to 90 days.

Before you begin

Role required: sam_admin or sam_user

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. Open the License operations view.
3. From the left navigation menu of the License operations view, navigate to **IBM ILMT V2 Integration** > **Peak Consumption By Product**.
4. View the highest full capacity and sub-capacity PVU, RVU, and VPC usage for your IBM software products.
   The Software Asset Management application displays the highest usage within an aggregated time period of up to 90 days. You can define this aggregated time period in ILMT or BigFix Inventory.

View the peak usage of your IBM software products by device

If you are integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory using version 2 of the ILMT and BigFix Inventory integration APIs, view the highest full capacity and sub-capacity Processor Value Unit (PVU), Resource Value Unit (RVU), and Virtual Processor Core (VPC) usage for your IBM software products by physical host or virtual machine (VM).

Before you begin

Role required: sam_admin or sam_user

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. Open the License operations view.
3. From the left navigation menu of the License operations view, navigate to **IBM ILMT V2 Integration** > **Peak Consumption Breakdown By Device**.
4. View the highest full capacity and sub-capacity PVU, RVU, and VPC usage for your IBM software products by physical host or VM.
   The Software Asset Management application displays the highest usage within an aggregated time period of up to 90 days. You can define this aggregated time period in ILMT or BigFix Inventory.

View the devices that are running your IBM software products

If you are integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory using version 2 of the ILMT and BigFix Inventory integration APIs, view the complete list of physical hosts and virtual machines (VMs) that are running your IBM software products.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sam_admin or sam_user

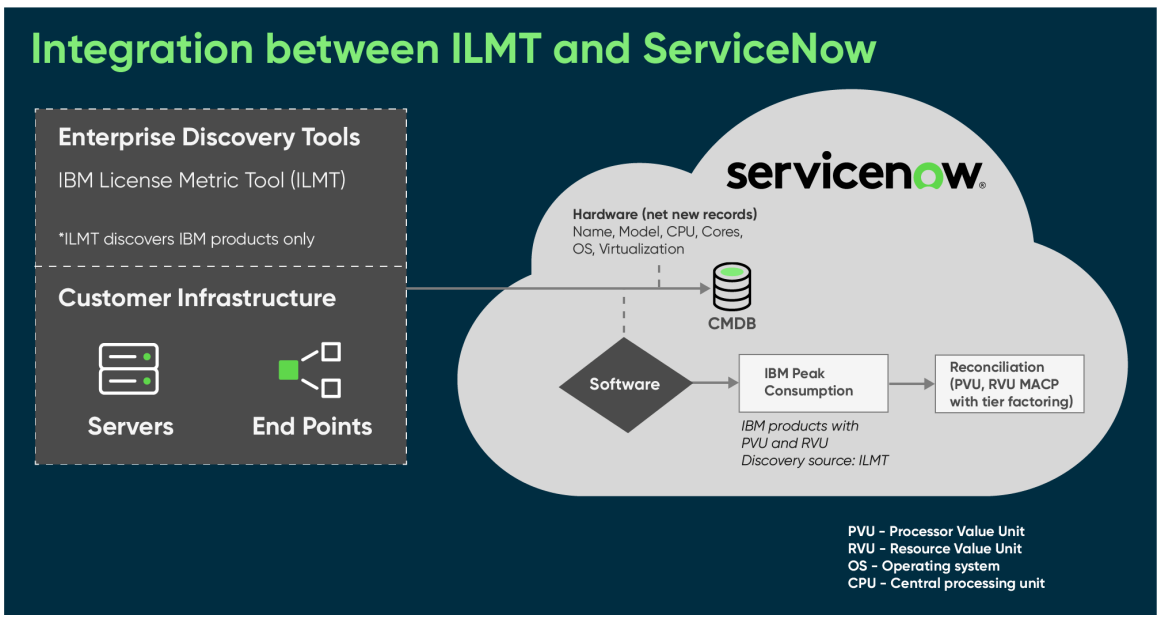
Procedure
1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. Open the License operations view.
3. From the left navigation menu of the License operations view, navigate to **IBM ILMT V2 Integration** > **ILMT Discovered Computer**.
4. View the list of physical hosts and VMs that are running your IBM software products.
   You can also view detailed information about each host or VM, including the hardware model, the hardware serial number, and the corresponding configuration item (CI) in the Configuration Management Database (CMDB).

Integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory using v1 APIs

You can use version 1 of the IBM License Metric Tool (ILMT) and BigFix Inventory integration APIs to create a connection between your IBM servers and the ServiceNow AI Platform.

This connection enables you to import software installation data into your ServiceNow instance so that you can track and optimize full capacity and sub-capacity processor value unit (PVU) and resource value unit (RVU) licensing for your IBM software products.

Important: Version 1 of the ILMT and BigFix Inventory integration APIs have been deprecated by IBM. However, the Software Asset Management application continues to support integrations that are using this version of the APIs. If you are setting up an ILMT or BigFix Inventory integration for the first time, use version 2 of the APIs instead. For more information on setting up the integration using version 2 of the APIs, see Integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory using v2 APIs. For more information on the deprecation of these APIs, see Deprecated REST APIs.



The ILMT and BigFix Inventory integration enables you to create connections between one or more IBM servers and the ServiceNow AI Platform using HTTP or HTTPS. Upon activating the Software Asset Management Professional for IBM (com.sn_samp_ibm) plugin, you receive an IBM Server connection alias that you can then use to set up your IBM server connections. If a connection is successful, the Software Asset Management application retrieves historical software installation data within the aggregated period that you defined in ILMT or BigFix

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inventory. This data includes products, components, editions, hosts, virtual machines, and license usage.

Note: License usage is based on product use and not component use.

Prerequisites

To track your IBM full capacity and sub-capacity PVU and RVU licenses using this integration, you must complete the following prerequisites:

- Install, set up, and run ILMT or BigFix Inventory on a physical host or virtual machine (VM).

  Important: When you are setting up ILMT, ensure that all required configuration item (CI) data, including serial numbers, names, and IP addresses, is configured correctly so that your ServiceNow instance can accurately create corresponding CI records in the Configuration Management Database (CMDB). Refer to KB0691430 for more details.

- Install ILMT version 9.2.7 or later.
- Configure your IBM ILMT agents to scan your physical hosts or VMs in compliance with IBM usage measurement guidelines.

  Note: Refer to Measuring License Use for more information on IBM usage measurement guidelines.

- Enable ILMT or BigFix Inventory to discover the configurations of both physical hosts and VMs as well as the relationships between them.
- Classify and bundle IBM components into IBM products through ILMT or BigFix Inventory.
- Set the **Connect to ILMT using** (*sn_samp_ibm_lic.ilmt_api_version*) Software Asset Management property to **v1 API's**. For more details on this property, see Software Asset Management properties.

Transform maps for IBM License Metric Tool (ILMT) and BigFix Inventory integration v1 APIs

When you import data from the IBM License Metric Tool (ILMT) or BigFix Inventory using version 1 of the ILMT and BigFix Inventory integration APIs, your ServiceNow instance uses transform maps to process this data into ServiceNow tables.

Default ILMT and BigFix Inventory transform maps

By default, ServiceNow provides the following transform maps for ILMT and BigFix Inventory data when you are using version 1 of the ILMT and BigFix Inventory APIs:

Default ILMT and BigFix Inventory transform maps

Transform Map	Source Table	Target Table	Description
ILMT Computer Identity V1	Computer [imp_samp_ilmt_computer_system]	Computer [cmdb_ci_computer]	Processes identification data for your virtual machines (VMs) and hosts. The ILMT Computer Identity V1 transform map uses the CMDB

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Default ILMT and BigFix Inventory transform maps (continued)

Transform Map	Source Table	Target Table	Description
			IRE API to create a configuration item (CI) record for each VM or host in the Computer [cmdb_ci_computer] table. If a VM uses the same hardware serial number as its host, the transform map creates a CI record for only the host. For more information on the CMDB IRE API, see Identification and Reconciliation engine (IRE). **Note:** ServiceNow does not support hardware serial numbers containing periods (.).
ILMT Software Instance	ILMT Software Instance [imp_samp_ilmt_sw_instance]	Global [global]	Processes installation data for each IBM software component and product on your VMs and hosts. Software components are the independent units of software that you install or run on a VM. You can identify but not license software components individually. Software products are the units of software packaging on a host that can comprise of a collection of software components. You can license the software product as a whole. For more information on software components and products, refer to

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Default ILMT and BigFix Inventory transform maps (continued)

Transform Map	Source Table	Target Table	Description
			the IBM Knowledge Center. The ILMT Software Instance transform map creates a record for each IBM software component and product installation in the IBM Peak Consumption [samp_ilmt_sw_install] table. **Note:** Although software products are not actual software installations, the transform map treats them as installations so that you can update and track license usage against each software product for reconciliation and compliance purposes.
ILMT Software License Usage	License Consumption [imp_samp_ilmt_license_usage]	Global [global]	Processes license usage data for your IBM software products. You can use this data to reconcile your IBM software products and verify compliance. **Note:** License usage data is reported against physical hosts only, as IBM software products are licensed based on physical host usage and not virtual machine (VM) usage. The ILMT Software License Usage

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Default ILMT and BigFix Inventory transform maps (continued)

Transform Map	Source Table	Target Table	Description
			transform map updates license usage data on corresponding records in the IBM Peak Consumption [samp_ilmt_sw_install] table. If a corresponding record does not exist, the transform map creates a record for your license usage data with the `version` set to `Not reported`.

ILMT and BigFix Inventory data processing

Each ILMT and BigFix Inventory transform map processes data using field maps or transform map scripts.

ILMT Computer Identity V1 transform map

The ILMT Computer Identity V1 transform map processes data from the source Computer [imp_samp_ilmt_computer_system] table to the target Computer [cmdb_ci_computer] table using both field maps and a transform map script.

By default, the ILMT Computer Identity V1 transform map includes the following field maps:

Default field maps

Source Field	Target Field	Description
u_ip_address	ip_address	IP address of the host or virtual machine.
u_dns_name	dns_domain	Domain name of the host or virtual machine.
u_server_processors	cpu_count	Number of CPUs or virtual CPUs (vCPUs) on the host or virtual machine.
u_host_name	name	Name of the host or virtual machine.
u_processor_brand_string	cpu_name	Brand name of the CPU or vCPU on the host or virtual machine (for example, IBM).
u_server_cores	cpu_core_count	Number of CPU or vCPU cores on the host or virtual machine.
[Script]	discovery_source	Discovery source that pulls in IBM software installation data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Default field maps (continued)

Source Field	Target Field	Description
		Possible values are `ILMT` or `BigFix Inventory`.
[Script]	virtual	Option indicating whether a machine is virtual.
u_processor_brand	cpu_type	Type of CPU or vCPU on the host or virtual machine (for example, dual core CPU).
u_hardware_serial_number	serial_number	Serial number that identifies the host.

In addition to using field maps, the transform map processes data using the onAfter transform map script, which is an event script that processes at the end of each row transformation. For more information on this transform map script, see Map with transformation event scripts.

ILMT Software Instance transform map

The ILMT Software Instance transform map processes data from the source ILMT Software Instance [imp_samp_ilmt_sw_instance] table to the target IBM Peak Consumption [samp_ilmt_sw_install] table using the onComplete transform map script. The onComplete transform map script is an event script that processes at the end of an import. For more information on this transform map script, see Map with transformation event scripts.

ILMT Software License Usage transform map

The ILMT Software License Usage transform map processes data from the source License Consumption [imp_samp_ilmt_license_usage] table to the target IBM Peak Consumption [samp_ilmt_sw_install] table using the onStart transform map script. The onStart transform map script is an event script that processes at the beginning of an import. For more information on this transform map script, see Map with transformation event scripts.

Setting up an IBM License Metric Tool (ILMT) or BigFix Inventory integration using HTTPS

You can set up an IBM License Metric Tool (ILMT) or BigFix Inventory integration for IBM compliance reporting.

If you're using an HTTPS connection, you can use any of the following connection types:

- HTTPS with the MID Server
- HTTPS without the MID Server

HTTPS with the MID Server

Set up IBM License Metric Tool (ILMT) and BigFix Inventory integration for IBM compliance reporting using an HTTPS connection with the MID Server.

Before you begin

Role required: sys_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Download the certificate by logging in to the ILMT or BigFix Inventory server and navigating to **Management** > **Server Settings**.
2. Import a certificate for the MID Server.

What to do next

After you've finished uploading your certificates, create a connection to ILMT/BigFix Inventory.

HTTPS without the MID Server

Set up IBM License Metric Tool (ILMT) and BigFix Inventory integration for IBM compliance reporting using an HTTPS connection without the MID Server.

Before you begin

Role required: sys_admin

About this task

Note: The firewall port must be opened for connectivity to your ServiceNow instance IP address.

Procedure

1. Download the certificate by logging in to the ILMT or BigFix Inventory server and navigating to **Management** > **Server Settings**.
2. From your ServiceNow instance, navigate to **System Definition** > **Certificates** and create a certificate (Trust Store Cert, PEM format).
3. Paste the full downloaded ILMT or BigFix Inventory server certificate content into the **PEM Certificate** field (including banners).
4. Select the **Validate Stores/Certificates** related link.
5. To create the Java Key Store file using the IBM certificate file, open the command prompt on your computer and navigate to the folder that contains the JRE keytool.
6. Execute the following commands:

```
keytool -import -trustcacerts -alias <Certificate alias>
 -file <Certificate file path> -keystore IBM_Server.keystore
 -storetype jks
keytool -list -v -keystore IBM_Server.keystore
```

   These commands generate the `IBM_Server.keystore` file.

7. Return to the ServiceNow AI Platform, navigate to **System Definition** > **Certificates** and create a certificate (Java Key Store).
8. Upload the `IBM_Server.keystore` file that you generated as an attachment to the certificate record.
9. Select the **Validate Stores/Certificates** related link.
10. Navigate to **System Security** > **Protocol Profiles** and create a new protocol profile using the Java Key Store certificate that you created.

    Note: You need to select the protocol profile that you create when you create a connection to ILMT/BigFix Inventory.

What to do next

After you've finished uploading your certificates, create a connection to ILMT/BigFix Inventory.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a connection to ILMT or BigFix Inventory

If you're using an HTTP connection or you've finished the initial configuration for HTTPS, establish a connection between your IBM server and the ServiceNow AI Platform.

Before you begin

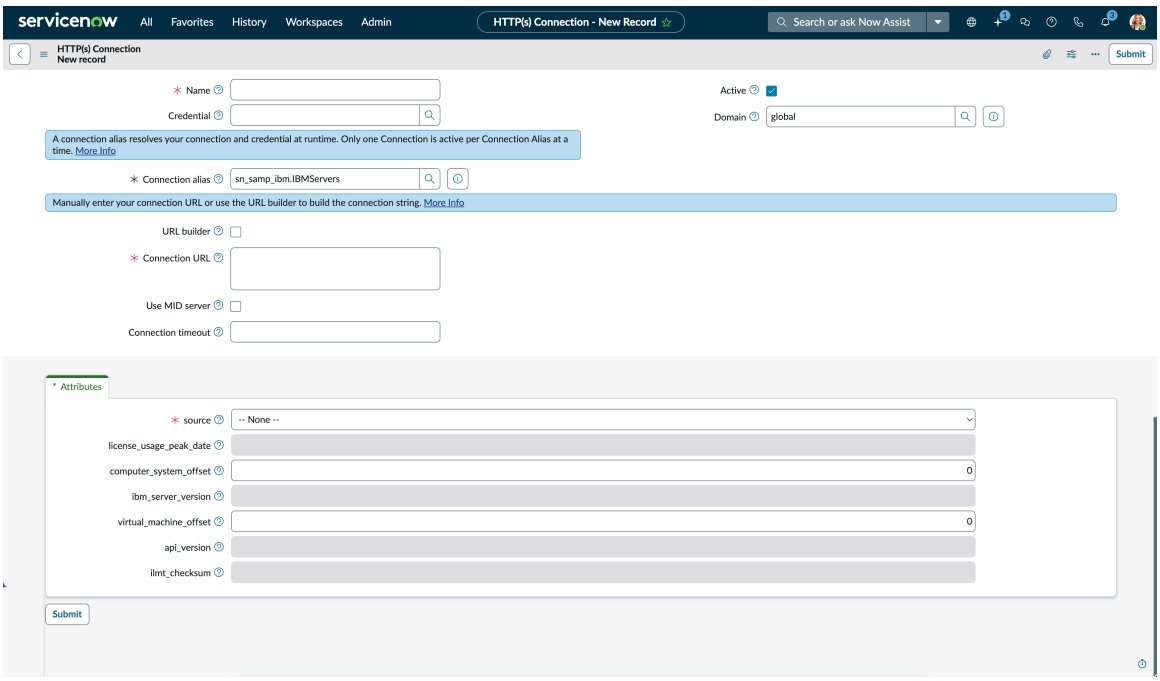
Role required: sam_admin

About this task

Note: If you're using an HTTP or HTTPS connection without the MID Server, the firewall port must be opened for connectivity to your ServiceNow instance IP address.

Procedure

1. Navigate to **All** > **Integration – ILMT / BigFix Inventory** > **Setup**.
2. On the **Connections** related tab of the Connection & Credential Aliases form, select **New**. The HTTP(s) Connection form opens.



3. On the form, fill in the fields.

HTTP(s) Connection form

Field	Description
Name	Unique name of the connection.
Credential	Credentials that are used to establish the connection. You can use either basic authentication credentials, such as a username and password, or API key credentials. **Note:** Select the same credentials that you use to access the ILMT server.

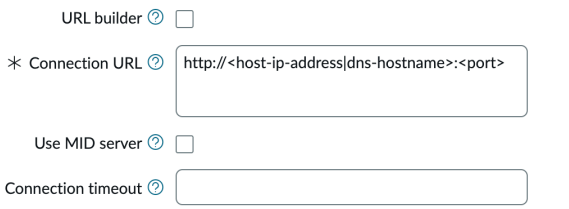
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Connection alias	Connection alias with which the connection can be referred. This connection alias resolves your connection and credentials at runtime. This field is automatically set to the **sn_samp_ibm.IBMServers** alias.
Active	Option indicating that the connection is active.
Domain	Domain to which the connection belongs.

4. Specify the URL for the connection.
   Depending on whether you are using an HTTP or HTTPS connection, use one of the following options to specify the connection URL:

   - **HTTP connection**: Specify the HTTP connection URL using the **Connection URL** field.

     In the **Connection URL** field, enter a URL in the `http://<host-ip-address|dns-hostname>:<port>` format.

     Note: You cannot modify the **Connection URL** field if you select the **URL builder** check box.

   - **HTTPS connection**: Specify the HTTPS connection URL using either the URL builder or an SSL certificate.

HTTPS Connection URL Option	Procedure
URL builder	**a.** To enable your ServiceNow instance to build a connection URL using the URL builder, select the **URL builder** check box. The **Mutual authentication**, **Protocol**, **Host**, **Override default port**, and **Base path** fields appear on the form. 

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HTTPS Connection URL Option	Procedure
	b. In the **Protocol** field, specify the underlying protocol that is used by the connection. This field is automatically set to **https**. **c.** In the **Host** field, enter the URL of the target host that is used by the connection. You must enter a URL in the `https://<host-ip-address|dns-hostname>:<port>` format. **d.** (Optional) In the **Override default port** field, enter the port number of the target port that is used by the connection. You must enter the same port number that you used for your ILMT or BigFix Inventory setup. **e.** (Optional) In the **Base path** field, enter the base path for the connection.
SSL certificate	**a.** Retrieve an SSL certificate from your IBM server. **b.** Depending on whether you are using an HTTPS connection with or without the MID Server, use one of the following options to apply the certificate to your ServiceNow instance: ▪ Without the MID Server: **i.** In a new tab or window, upload the certificate to your ServiceNow instance. Refer to HTTPS without the MID Server for detailed instructions. **ii.** Return to the HTTP(s) Connection form. **iii.** Enable your ServiceNow instance to build a connection URL by selecting the **URL builder** check box. The **Mutual authentication**, **Protocol**, **Host**, **Override default port**, and **Base path** fields appear on the form.  **iv.** Enable mutual authentication for the connection by selecting the **Mutual authentication** check box. The **Protocol** field is replaced by the **Protocol profile** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HTTPS Connection URL Option	Procedure



v. In the **Protocol profile** field, select the search icon to locate and select the HTTPS protocol profile that specifies the certificate used for mutual authentication.

You must select the same protocol profile that you created in HTTPS without the MID Server.

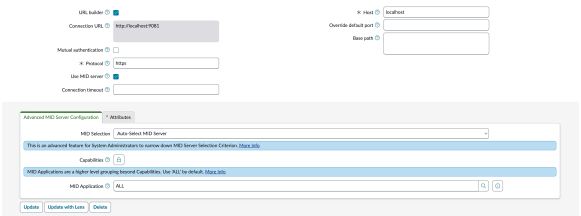
- With the MID Server:

i. In a new tab or window, upload the certificate to your ServiceNow instance.

Refer to HTTPS with the MID Server for detailed instructions.

ii. Return to the HTTP(s) Connection form and then select the **Use MID server** check box.

The **Advanced MID Server Configuration** tab appears.



iii. In the **MID Selection** field of the **Advanced MID Server Configuration** tab, specify how you want to select a MID Server for the connection.

Select one of the following options:

- **Auto-select MID Server**: Automatically selects a MID Server from the list of MID Servers that are configured for the connection. This option is selected by default.

  If you select this option, the **Advanced MID Server Configuration** tab displays the **Capabilities** and **MID Application** fields. You can use these fields to filter the list of available MID Servers based on supported MID Server capabilities and applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HTTPS Connection URL Option	Procedure
	▪ To filter this list based on MID Server capabilities, select the Unlock Capabilities icon in the **Capabilities** field. After you unlock the field, select the Lookup using list icon to search for and select the desired capabilities. ▪ To filter this list based on MID Server applications, select the Lookup using list icon in the **MID Application** field to search for and select the desired applications. See MID Server selection for more information on MID Server capabilities and applications. ▪ **Specific MID Server**: Enables you to select a specific MID Server for the connection. If you select this option, the **Advanced MID Server Configuration** tab displays the **MID Server** field. Select the Lookup using list icon in the **MID Server** field to search for and select the MID Server that you want to use for the connection. **Important:** To select a specific MID Server for the connection, you must deselect the **Included in application ALL** check box for any applications that are configured to use the specified MID Server. For more information on this check box, refer to the Select applications to include in the definition of ALL for a MID Server section of Configure a default MID Server for each application. ▪ **Specific MID Cluster**: Enables you to select a specific MID Server cluster for the connection. If you select this option, the **Advanced MID Server Configuration** tab displays the **MID Cluster** field. Select the Lookup using list icon in the **MID Cluster** field to search for and select the MID Server cluster that you want to use for the connection.

5. Set up the connection timeout.
   Use one of the following options to set up the connection timeout:
   - **glide.http.outbound.max_timeout.enabled system property**: The ServiceNow AI Platform *glide.http.outbound.max_timeout.enabled* system property enables you to specify the number of seconds that RESTMessageV2 and SOAPMessageV2 APIs wait for a response from a synchronous call. You can configure this system property by opening a new tab or window and then navigating to **System Properties** > **All Properties** > **glide.http.outbound.max_timeout.enabled**. If this system property is set to **true** or is not available on your ServiceNow instance, your instance uses a default timeout value of 30 seconds. If this system property is set to **false**, your ServiceNow instance uses a default timeout value 600 seconds. See Available system properties for more information on this system property.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Connection timeout field**: The **Connection timeout** field on the HTTP(s) Connection form enables you to specify the number of seconds that your ServiceNow instance waits to establish the given connection.

  Important: This option is applicable only in the San Diego and later releases. In the Rome and earlier releases, you must set up the connection timeout using only the *glide.http.outbound.max_timeout.enabled* system property.

  Application of the **Connection timeout** field is dependent on your *glide.http.outbound.max_timeout.enabled* system property configuration. If the system property is set to **false**, your ServiceNow instance honors the value that is specified in the **Connection timeout** field.

  Note: If the **Connection timeout** field is empty, your ServiceNow instance uses a default connection timeout value of 300 seconds.

  If the system property is set to **true** or is not available on your ServiceNow instance, your instance ignores the value that is specified in the **Connection timeout** field. Instead, your instance uses a default connection timeout value of 30 seconds.

6. Configure additional attributes for the connection.

   Select the **Attributes** tab and then fill in the fields.



Attributes tab

Field	Description
source	Source of your IBM software installation data. The options are **ILMT** and **BigFix Inventory**.
computer_system_offset	Offset value that prevents your ServiceNow instance from re-importing computer records from ILMT or BigFix Inventory. Each time you run an import, the offset value updates automatically based on the computer records that are included in the import. Every subsequent import then retrieves only new computer records starting from the specified offset value. If you are establishing a new connection, verify that the offset value is set to **0**. If you want to re-import all computer records for an existing connection, reset the offset value to **0**.
virtual_machine_offset	Offset value that prevents your ServiceNow instance from re-importing virtual machine (VM) records from ILMT or BigFix Inventory. Each time you run an import, the offset value updates automatically based on the VM records that are included in the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	import. Every subsequent import then retrieves only new VM records starting from the specified offset value. If you are establishing a new connection, verify that the offset value is set to **0**. If you want to re-import all VM records for an existing connection, reset the offset value to **0**.

7. Select **Submit**.
   The active connection information displays.
8. **Optional:** If you are using version 1 of the ILMT and BigFix Inventory APIs, import ILMT or BigFix Inventory scheduled data manually.

   a. Navigate to **Integration - ILMT / BigFix Inventory** > **Scheduled Import** and then select **Execute Now**.

   b. Verify that the import has completed successfully.
   - To verify that both the import and transformation have completed successfully, navigate to **Integration - ILMT / BigFix Inventory** > **Transform History**.

     Note: Every record in the Transform Histories table displays an **Inserts** value of 0.

   - To view all data that was imported into the License Consumption [samp_ilmt_sw_install] table, navigate to **Integration - ILMT / BigFix Inventory** > **Import Set Data** > **License Consumption**.
   - To view all data that was imported into the Computer [cmdb_ci_computer] table, navigate to **Integration - ILMT / BigFix Inventory** > **Import Set Data** > **Computers**.

Validate your ILMT connection health

Validate the health of your ILMT connections to help improve the success of each connection. Use the results to evaluate how you can resolve unsuccessful connections, such as adjusting the connection response time or fixing errors related to invalid hardware serial numbers.

Before you begin
Role required: sam_admin

Procedure
1. Navigate to **All** > **Software Asset** > **Integration - ILMT/BigFix Inventory** > **Connection Health**.
2. Select **Validate**.
   The Connection Healths list reloads with the latest status of each ILMT connection.
3. Verify the status of each connection using the **Status** field.
   If the **Status** field is set to **Failed**, refer to the corresponding **Information** field for more details about why that connection has failed and what actions you can take to help it establish successfully.

   For example, if a connection has failed due to a timeout issue, the **Information** field indicates that the connection has timed out. The **Information** field also suggests a recommended timeout value to help prevent the connection from failing again.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Client Value Acceleration (CVA) integrations for IBM

Integrate the Software Asset Management publisher pack for IBM with authorized Software Asset Management providers to track and manage IBM licenses across virtualized VMware vSphere and Nutanix environments, and IBM LPAR infrastructures. These integrations help you to track and manage IBM licensing directly without integrating with the IBM License Metric Tool (ILMT) or BigFix Inventory.

The CVA Program is a license verification program that allows clients who contract with Authorized SAM Providers (ASPs) to report on their IBM license usage independently. For more information on the CVA Program, refer to the IBM CVA Program page.

Important: As of January 1, 2025, IBM has withdrawn its IBM Authorized SAM Provider (IASP) Program and replaced it with the CVA Program. If you're an existing IASP Program user, contact your IBM representative to upgrade to the new CVA agreement and migrate to the CVA Program.

The IBM publisher pack supports integrations with the following ASPs:

- Anglepoint (through the Anglepoint Elevate platform)
- Deloitte
- EY
- KPMG

To integrate with an ASP, you must request and install the IBM License Compliance for Software Asset Management application from the ServiceNow® Store. This application provides the core functionality and license metrics that are required for tracking and managing IBM licensing directly. If you are integrating with Anglepoint, you must also request and install Anglepoint's IBM Licensing for Software Asset Management application from the ServiceNow® Store. This application enables you to store IBM software information from Anglepoint.

After you install the necessary applications, you must retrieve the IBM software discovery catalog from the ASP that you are integrating with. This catalog, which is maintained separately by each ASP, is a centralized repository of IBM software information that discovery tools, such as the ServiceNow® Discovery application, can use to identify the IBM software that is discovered in your environment. After you retrieve the catalog, you must upload it to your ServiceNow instance.

On successful upload, you can use the ServiceNow Discovery application to run a discovery for your IBM software. The Discovery application uses the uploaded catalog to identify any IBM software that is discovered in your environment. It then sends this data to the ASP for comprehensive software classification and bundling.

After your discovered IBM software is properly classified and bundled, the ASP sends this data back to your ServiceNow® instance. The Software Asset Management application can then use the processor value unit (PVU), resource value unit (RVU), and virtual processor core (VPC) license metrics to reconcile this data so that you can track your IBM software usage and optimize your licensing costs. For more information on the PVU and RVU license metrics, see IBM processor value unit (PVU) and resource value unit (RVU) licenses. For more information on the VPC license metric, see IBM virtual processor core (VPC) licenses.

Prerequisites

Before you can integrate the IBM publisher pack with an ASP, you must complete the following prerequisites:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Complete all prerequisites for participating in the CVA Program. For more information on these prerequisites, refer to the How it works section of CVA Program Verification.
- Request and install the IBM License Compliance for Software Asset Management application from the ServiceNow® Store. See Request the IBM License Compliance for Software Asset Management application for Authorized Software Asset Management Provider (ASP) integrations for detailed instructions.
- Enable the **Use ServiceNow Software Asset Management and Discovery for IBM license compliance** (*com.snc.samp.ibm.use_samp_ibm_licensing*) Software Asset Management property. See Software Asset Management properties for more information on this property.
- Activate the Discovery (com.snc.discovery) plugin on your ServiceNow instance. See Request Discovery for detailed instructions.
- Activate the File-based Discovery (com.snc.discovery.file_based_discovery) plugin on your ServiceNow instance. See File-based Discovery for more information on file-based Discovery.
- Request and install the Discovery and Service Mapping Patterns application from the ServiceNow Store. See Discovery patterns used by ITOM Visibility for more information on Discovery and Service Mapping patterns.
- If you want to use domain separation for the integration, activate the Domain Support - Domain Extensions Installer (com.glide.domain.msp_extensions.installer) plugin on your ServiceNow instance. See Domain separation plugin for detailed instructions.
- Download the IBM software discovery catalog from the ASP.
- If you want to track and manage IBM licensing in public cloud environments, configure one or more for the following services to automatically scan for and update the CMDB with cloud infrastructure changes every 30 minutes:
  - For public clouds hosted by AWS, configure the AWS Config service. See Configure AWS Config event notifications for detailed instructions.
  - For public clouds hosted by Microsoft Azure, configure the Microsoft Azure Alert service. See Configure the Microsoft Azure Alert service to auto-update the CMDB for detailed instructions.
  - For public clouds hosted by Google Cloud Platform (GCP), configure the Google Cloud Logging service. See Configure the Google Cloud Logging service to auto-update the CMDB for detailed instructions.

If you are integrating the IBM publisher pack with Anglepoint, you must also complete these additional prerequisites:

- Request and install Anglepoint's IBM Licensing for Software Asset Management application from the ServiceNow® Store. See Request Anglepoint's IBM Licensing for Software Asset Management application for detailed instructions.
- Set up the Anglepoint Elevate platform.

Virtualization technologies and public cloud platforms supported by IBM Authorized SAM Provider (ASP) integrations

IBM ASP integrations support IBM licensing in VMware vSphere Nutanix, and IBM LPAR infrastructures. These integrations also support IBM licensing in public cloud environments that are owned and managed by AWS, Microsoft Azure, and Google Cloud Platform (GCP).

IBM licensing in VMware vSphere environments

When you integrate the Software Asset Management publisher pack for IBM with Software Asset Management providers that are authorized to participate in the IBM Client Value Acceleration

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

(CVA) Program, the Software Asset Management application supports IBM licensing rules for VMware vSphere and Nutanix.

VMware vSphere and Nutanix are virtualization platforms through which you can install and run IBM software products on virtual machines (VMs). The Software Asset Management application supports both full capacity and sub-capacity processor value unit (PVU), resource value unit (RVU), and virtual processor core (VPC) licensing for IBM software products in VMware vSphere and Nutanix environments.

When you run a discovery on a VMware vSphere or Nutanix AHV environment, the discovered data is populated and stored in Configuration Management Database (CMDB) tables on your ServiceNow instance.

For a Nutanix AHV environment, data is stored in the following tables. For more information on the Nutanix discovery pattern, see Nutanix Acropolis discovery.

- cmdb_ci_nutanix_vm_instance
- cmdb_ci_nutanix_cluster
- cmdb_ci_nutanix_host

To populate and store the Nutanix AHV data, request and install the CMDB CI Class Models application from the ServiceNow Store. This application adds or updates the CMDB classes required for the Nutanix AHV platform. For more information, see Nutanix extension classes.

For a VMware vSphere environment, data is stored in the following tables. For more information on the VMware vSphere discovery, see Data collected for VMware Cloud Discovery.

- cmdb_ci_vcenter_datacenter
- cmdb_ci_vcenter_cluster
- cmdb_ci_esx_server
- cmdb_ci_vmware_instance

IBM licensing models on VMware vSphere and Nutanix

Licensing capacity	Licensing model
Full capacity	When you install and run an IBM software product on a VM, you must license each processor core on the underlying physical ESXi host that is running the VM. If the physical ESXi host is running multiple VMs simultaneously, you must still license each processor core on the host regardless of how many VMs you install and run the IBM software product on. Use the total number of processor cores on the underlying physical ESXi host to determine the number of rights that are required for your license, based on the license type. To determine the number of rights that are required for a PVU or RVU license, see IBM processor value unit (PVU) and resource value unit (RVU) licenses. To determine the number of rights that are required for a VPC license, see IBM virtual processor core (VPC) licenses.
Sub-capacity	You must license only the virtual cores that are assigned to the VMs on which you install and run an IBM software product.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

IBM licensing models on VMware vSphere and Nutanix (continued)

Licensing capacity	Licensing model
Note: You can use sub-capacity licensing only if you configure and specify a VM manager for your VMs. For more information on VM managers, see Specify VMMs for IBM licenses.	Use the sum of virtual cores that must be licensed across your VMs to determine the number of rights that are required for your license, based on the license type. To determine the number of rights that are required for a PVU or RVU license, see IBM processor value unit (PVU) and resource value unit (RVU) licenses. To determine the number of rights that are required for a VPC license, see IBM virtual processor core (VPC) licenses. **Note:** By default, the number of required rights is calculated using the sum of virtual cores. If the sum of virtual cores exceeds the total number of processor cores on the underlying physical ESXi hosts that are running the VMs, the number of required rights is calculated using the total number of processor cores on the hosts instead. **Note:** If you install and run an IBM software product on both a VM and the underlying physical ESXi host that is running the VM, you must also license the installation on the host.

IBM licensing in IBM LPAR infrastructures

When you integrate the Software Asset Management publisher pack for IBM with Software Asset Management providers that are authorized to participate in the IBM Client Value Acceleration (CVA) Program, the Software Asset Management application supports IBM licensing rules for IBM logical partitions.

A logical partition (LPAR) is a defined subset of processor hardware that supports the operating system. An LPAR contains resources, such as processors, memory, and input or output devices, that operate as an independent system. You can have multiple LPARs within each mainframe hardware system.

Discovering the LPARs and LPAR resources within your IBM LPAR infrastructure requires ServiceNow Discovery patterns for the IBM Hardware Management Console (HMC), which is the hardware appliance that enables you to manage and configure your LPARs. To access these discovery patterns, you must request and install the Discovery and Service Mapping Patterns application from the ServiceNow Store. For more information on how to configure a discovery on your LPARs, see IBM Virtualization and Hardware Management Console discovery.

Note: The *lparstat* command pulls a report of LPAR-related information and usage. For more information, see the IBM Knowledge Center.

When you run a discovery, your discovered LPAR data is populated and stored in the following Configuration Management Database (CMDB) tables on your ServiceNow instance:

- cmdb_ci_ibm_frame
- cmdb_ci_aix_server
- cmdb_ci_lpar_instance
- cmdb_ci_lpar_resource
- cmdb_rel_ci
- cmdb_sam_sw_install

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To populate and store this data, you must request and install the CMDB CI Class Models application from the ServiceNow Store. This application adds or updates CMDB classes for the IBM HMC. For more information on IBM HMC CMDB classes, see IBM Hardware Management Console (HMC) extension classes.

The Software Asset Management application supports both full capacity and sub-capacity processor value unit (PVU), resource value unit (RVU), and virtual processor core (VPC) licensing for IBM software products in IBM LPAR infrastructures.

IBM licensing rules in IBM LPAR infrastructures

Full capacity licensing

When you use full capacity licensing, you must license each processor core on the underlying hardware system that is running the LPARs on which you have installed and run an IBM software product.

Using the total number of processor cores on the underlying hardware system, you can determine the number of rights that are required for your license based on the license type. To determine the number of rights that are required for a PVU or RVU license, see IBM processor value unit (PVU) and resource value unit (RVU) licenses. To determine the number of rights that are required for a VPC license, see IBM virtual processor core (VPC) licenses.

Sub-capacity licensing

When you use sub-capacity licensing, you must license only the processor cores that are assigned to the LPARs on which you install and run an IBM software product.

You can determine the number of rights that are required for a sub-capacity license based on the type of processor pool and license that you are using for your IBM software product.

IBM LPARs support both dedicated and shared processor pools. If you are using a dedicated processor pool, in which processor cores are assigned to only one dedicated LPAR, you must license each dedicated processor core that is assigned to the LPAR on which you install or run an IBM software product. If you are using a shared processor pool, in which processor cores are shared across micro-partitions, you must license the processor cores that are shared across the micro-partitions on which you install or run an IBM software product. You can determine the number of processor cores that must be licensed across your micro-partitions based on the LPAR type:

- **Capped LPAR**: A capped LPAR is a logical partition that is assigned a maximum entitled capacity, which is the number of CPU resources that the LPAR is entitled to receive. Capped LPARs cannot use more processor power than the assigned entitled capacity.
- **Uncapped LPAR**: An uncapped LPAR is a logical partition that can use more processor power than the assigned entitled capacity. Processor power usage is limited by the number of virtual processor cores that are assigned to the LPAR or by the maximum number of processor cores that are available to the shared processor pool.

For more details, see Sub-capacity (Virtualization) License Counting Rules.

Using the sum of processor cores that must be licensed across your processor pools, you can determine the number of rights that are required for your license based on the license type. To determine the number of rights that are required

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

for a PVU or RVU license, see IBM processor value unit (PVU) and resource value unit (RVU) licenses. To determine the number of rights that are required for a VPC license, see IBM virtual processor core (VPC) licenses.

IBM licensing in public cloud environments

When you integrate the Software Asset Management publisher pack for IBM with Software Asset Management providers that are authorized to participate in the IBM Client Value Acceleration (CVA) Program, the Software Asset Management application supports IBM licensing rules in public cloud environments.

A public cloud is a cloud computing model through which computing resources are owned and managed by a third-party cloud provider but shared by multiple clients via the Internet. Clients can access these shared computing resources through the virtual machines (VMs) that are running on virtual servers within each public cloud.

The Software Asset Management application supports sub-capacity processor value unit (PVU) and virtual processor core (VPC) licensing for IBM software products in public cloud environments. Supported public cloud providers include Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP).

With sub-capacity licensing in public cloud environments, you must license the virtual cores that are assigned to the cloud-based VMs on which you install and run an IBM software product. You can determine the total number of rights that are required for a license based on the sum of virtual cores that must be licensed across your cloud-based VMs. To determine the number of rights that are required for a PVU license, see IBM processor value unit (PVU) and resource value unit (RVU) licenses. To determine the number of rights that are required for a VPC license, see IBM virtual processor core (VPC) licenses.

Important: When determining the number of rights that are required for a PVU license used for VMs deployed in a public cloud environment, you must always use a standard PVUs per Core value of 70, regardless of which public cloud environment you choose.

Licensing for IBM Cloud Paks

When you integrate the Software Asset Management publisher pack for IBM with Software Asset Management providers that are authorized to participate in the IBM Client Value Acceleration (CVA) Program, the Software Asset Management application supports licensing rules for IBM Cloud Paks.

An IBM Cloud Pak is a prepackaged set of IBM software products that can help you achieve a specific business goal. For example, the IBM Cloud Pak for Business Automation contains various IBM software products that automate business operations to help improve performance.

Each IBM Cloud Pak is licensed as a bundle using a supported IBM license metric, such as the Virtual Processor Core (VPC) license metric. However, you can determine the total number of rights that are required for a Cloud Pak based on the number of rights that are required for each software product within the Cloud Pak. These software products are also referred to as Bundled Programs. You can calculate the number of rights that are required for a Bundled Program by using a supported IBM license metric, such as the VPC and Resource Value Unit (RVU) license metrics. You must then use a corresponding conversion ratio to convert this number to the number of rights that are required for deploying the Bundled Program as part of the Cloud Pak. After you convert this number for each Bundled Program that you want to deploy, you can use the sum of the converted numbers to determine the total number of rights that are required for the Cloud Pak.

In the following example, a user wants to deploy various Bundled Programs as part of the IBM Cloud Pak for Integration:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Bundled Program within the IBM Cloud Pak for Integration	Bundled Program to Cloud Pak ratio	Number of rights required for the Bundled Program	Number of rights required for deploying the Bundled Program as part of the Cloud Pak
MQ Advanced	2 VPCs: 1 VPC	40	20
App Connect Enterprise	1 VPC: 3 VPCs	20	60
API Connect	1 VPC: 1 VPC	10	10
Datapower	1 VPC: 1 VPC	10	10

Based on the conversion ratios and the number of rights that are required for each Bundled Program, you must license the Cloud Pak using a total of 100 rights.

See IBM virtual processor core (VPC) licenses for more information on VPC licensing.

IBM reconciliation for IBM Authorized SAM Provider (ASP) integrations

IBM reconciliation keeps your IBM license positions accurate and up-to-date without requiring manual calculations. Reconciliation runs weekly or on-demand.

When the Software Asset Management application calculates the number of rights that are required for a processor value unit (PVU), resource value unit (RVU), or virtual processor core (VPC) license, it calculates two different numbers based on whether you are using the license to its full capacity or sub-capacity. The Software Asset Management application uses this information alongside the daily aggregated peak usage of your IBM software product and the usage type of your PVU, RVU, or VPC license to determine the high-water mark, or peak usage, of your IBM software product over a 90 day period.

Note: You can determine the high-water mark of your IBM software product per region, including the Americas, EMEA, and APAC.

The Software Asset Management application then uses the high-water mark value to reconcile your IBM software product so that you can determine if your license is in compliance.

Note: When you reconcile an IBM Cloud Pak, it is reconciled as a whole. The software products, also known as Bundled Programs, within the Cloud Pak are not reconciled individually.

Setting up an IBM Authorized SAM Provider (ASP) integration

Before you can integrate the Software Asset Management publisher pack for IBM with an Authorized SAM Provider (ASP), complete the setup process.

To integrate with an ASP, you must request and install the IBM License Compliance for Software Asset Management application from the ServiceNow® Store. If you are integrating with Anglepoint, you must also request and install Anglepoint's IBM Licensing for Software Asset Management application from the ServiceNow® Store. You must also upload the IBM software discovery catalog from the ASP to your ServiceNow instance.

Request the IBM License Compliance for Software Asset Management application for Authorized Software Asset Management Provider (ASP) integrations

Request the IBM License Compliance for Software Asset Management application from the ServiceNow® Store so that you can integrate the Software Asset Management publisher pack for

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

IBM with an Authorized SAM Provider (ASP). Use the integration to track and manage your IBM licenses.

Before you begin
Role required: admin

Procedure

1. From a web browser, go to the ServiceNow Store.
2. Log in using your HI credentials.
3. In the search bar, enter `IBM License Compliance for Software Asset Management` and then select **Search**.
4. Select the result called **IBM License Compliance for Software Asset Management**.
5. On the IBM License Compliance for Software Asset Management page, select **Request Install**. The ServiceNow Request for App Installation - IBM License Compliance for Software Asset Management dialog box opens.
6. In the dialog box, fill in the fields.

ServiceNow Request for App Installation - IBM License Compliance for Software Asset Management dialog box

Field	Description
Instance Name	Name of the instance on which you want to install the application. After you enter the instance name, select **Validate Instance** to verify that the instance exists.
Reason for request	Reason for requesting the application.

7. Select **Request**.
8. Select **Close**.

Result
If your request is approved, you will receive an email with detailed instructions on how to install the application.

What to do next
Install the application according to the instructions in the email.

License metrics added by the IBM License Compliance for Software Asset Management application

The IBM License Compliance for Software Asset Management application adds license metrics that enable you to classify your IBM software products.

These additional license metrics are available only if you have activated the Software Asset Management publisher pack for IBM and installed the IBM License Compliance for Software Asset Management application. They are not available if you have only activated the Software Asset Management publisher pack for IBM.

You can also use license metrics to reconcile the software products that are discovered in your environment. The Software Asset Management application automatically adds default license metrics for supported software publishers by using publisher-specific metric groups, such as the Adobe and Microsoft metric groups. These license metrics are then set in your corresponding software entitlements and used for reconciliation. Any additional license metric that is not

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

included in an existing metric group must be added as a custom license metric in order to be used for reconciliation. Custom license metrics modify the reconciliation process by adding software license calculations that are not already included in the default list of supported license metrics.

By default, the IBM metric group includes the following license metrics for IBM reconciliation:

- Authorized User
- Authorized User Value Unit
- Employee User Value Unit
- External User Value Unit
- Per Device
- Per Named User
- Per Processor (CPU count)
- Per user
- Processor Value Unit (PVU)
- Resource Value Unit (RVU)
- Virtual Processor Core (VPC)

All other license metrics that are added by the IBM License Compliance for Software Asset Management application are not included in the IBM metric group. If you want to reconcile your IBM software products using any of these license metrics, you must create a corresponding custom license metric on your ServiceNow instance. See Add a custom license metric for more information on how to create a custom license metric.

Request Anglepoint's IBM Licensing for Software Asset Management application

If you are integrating the Software Asset Management publisher pack for IBM with Anglepoint, request Anglepoint's IBM Licensing for Software Asset Management application from the ServiceNow® Store. This application extends the base Software Asset Management File Names [samp_file_name], File Maps [samp_file_map], and File Sets [samp_file_set] tables so that you can store IBM software information from Anglepoint.

Before you begin

Role required: admin

About this task

The IBM Licensing for Software Asset Management application contains table dictionaries that extend the base File Names [samp_file_name], File Maps [samp_file_map], and File Sets [samp_file_set] tables as follows:

Base table	Extended table
File Names [samp_file_name]	Anglepoint File Names [samp_anglepoint_file_name]
File Maps [samp_file_map]	Anglepoint File Maps [samp_anglepoint_file_map]
File Sets [samp_file_set]	Anglepoint File Sets [samp_anglepoint_file_set]

The extended tables store software information from the IBM software discovery catalog that is maintained by Anglepoint. You can add this software information to these tables by downloading the IBM software discovery catalog from the Anglepoint Elevate platform and then uploading it to your ServiceNow instance. Discovery tools, such as the ServiceNow® Discovery application, can then use this software information to identify the IBM software that is discovered in your

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

environment. See Upload the IBM software discovery catalog to your ServiceNow instance for more information on the IBM software discovery catalog.

Procedure

1. From a web browser, go to the ServiceNow Store.
2. Log in using your HI credentials.
3. In the search bar, enter `IBM Licensing for Software Asset Management` and then select **Search**.
4. Select the result called **IBM Licensing for Software Asset Management**.
5. On the IBM Licensing for Software Asset Management page, select **Request Install**.
   The ServiceNow Request for App Installation - IBM Licensing for Software Asset Management dialog box opens.
6. In the dialog box, fill in the fields.

ServiceNow Request for App Installation - IBM Licensing for Software Asset Management dialog box

Field	Description
Instance Name	Name of the instance on which you want to install the application. After you enter the instance name, select **Validate Instance** to verify that the instance exists.
Reason for request	Reason for requesting the application.

7. Select **Request**.
8. Select **Close**.

Result
If your request is approved, you will receive an email with detailed instructions on how to install the application.

What to do next
Install the application according to the instructions in the email.

Upload the IBM software discovery catalog to your ServiceNow instance

Upload the IBM software discovery catalog to your ServiceNow instance so that discovery tools, such as the ServiceNow® Discovery application, can identify the IBM software that is discovered in your environment.

Before you begin
Role required: sam_admin

About this task
The IBM software discovery catalog is a centralized repository of IBM software information that discovery tools can use to identify discovered IBM software. This catalog is maintained separately by each Authorized Software Asset Management Provider (ASP).

Procedure

1. Download the IBM software discovery catalog from the ASP that you are integrating with.
2. Upload the catalog to your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. From your ServiceNow instance, navigate to **All** > **Software Asset** > **Administration** > **Import IBM Content**.

b. On the Manage Software Library form, select **Attach Content File**.
The Attachments dialog box opens.

c. In the dialog box, select **Choose file** to search for and select the IBM software discovery catalog that you downloaded from the ASP.

d. Close the dialog box to return to the Manage Software Library form.

e. Select **Run Import**.

Result

If you are integrating with Anglepoint, all IBM software information that is included in the catalog is stored in the following Software Asset Management tables:

- Anglepoint File Names [samp_anglepoint_file_name]
- Anglepoint File Maps [samp_anglepoint_file_map]
- Anglepoint File Sets [samp_anglepoint_file_set]

Note: These tables are extensions of the base File Names [samp_file_name], File Maps [samp_file_map], and File Sets [samp_file_set] tables. To extend the base tables, you must request and install Anglepoint's IBM Licensing for Software Asset Management application. See Request Anglepoint's IBM Licensing for Software Asset Management application for detailed instructions.

Creating a connection for the Anglepoint integration

If you are integrating the Software Asset Management publisher pack for IBM with Anglepoint, you can create a connection between your ServiceNow instance and the Anglepoint Elevate platform to transfer licensing data for your IBM software products.

Create an API user for the Anglepoint integration

Create a user who is permitted to access the APIs used by the Anglepoint integration. These APIs provide the given user access to the Anglepoint integration resources that are available on your ServiceNow instance.

Before you begin

Role required: admin

About this task

The Anglepoint integration uses the following APIs:

Anglepoint integration APIs

API	API path	Description
Transform (POST)	/api/sn_samp_ibm_lic/ibm_data/transform	Processes information for your installed IBM software.
Get Computer	/api/sn_samp_ibm_lic/ibm_data/computer	Retrieves information about the virtual machines (VMs) and hosts that your IBM software is installed on.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Anglepoint integration APIs (continued)

API	API path	Description
Get Entitlements	/api/sn_samp_ibm_lic/ibm_data/entitlement	Retrieves entitlement information for your installed IBM software.
Get Classification	/api/sn_samp_ibm_lic/ibm_data/classification	Retrieves classification information for your installed IBM software.
Post Classification	/api/sn_samp_ibm_lic/ibm_data/classification	Sends classification information for your installed IBM software.

Procedure

1. Navigate to **All** > **Organization** > **Users** and then select **New**.
2. On the form, fill in the fields.

User form

Field	Description
User ID	Unique identifier for the user.
First name	First name of the user.
Last name	Last name of the user.
Title	Job title or job description of the user.
Department	Department that the user belongs to.
Password needs reset	Option to require the user to change the assigned password during the first login. **Note:** This option must be disabled.
Locked out	Option to lock the user out of the ServiceNow instance and terminate all active sessions.
Active	Option that indicates the user is active. **Note:** This option must be enabled.
Web service access only	Option to designate the user as a non-interactive user. Non-interactive users can use only assigned credentials to authorize API connections, including JSON, SOAP, and WSDL. See Non-interactive sessions for more information on non-interactive users. **Note:** This option must be enabled.
Internal Integration User	Option to designate the user as an internal integration user. See Mark service accounts as internal integration users for more information on internal integration users.
Email	Email address of the user.
Language	Language preference of the user.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Calendar integration	Calendar through which the user receives meeting invitations and notifications.
Time zone	Time zone that the user is located in.
Date format	Preferred date format for the user.
Business phone	Business phone number that is assigned to the user.
Mobile phone	Mobile phone number that is assigned to the user.
Photo	Photo of the user.

3. Right-click the form header and then select **Save**.
   The form automatically reloads with additional form actions, related links, and related tabs.
4. Generate a password for the user.

   a. Select **Set Password**.
      The Set Password dialog box opens.

   b. In the dialog box, select **Generate**.
      Your ServiceNow instance automatically generates a password for the user.

   c. Copy the value in the **Password** field.
      Save it in a secure location for later use.

   d. Select **Save Password**.
      The dialog box closes and you automatically return to the User form.

5. Assign roles to the user.

   a. On the **Roles** related tab, select **Edit...**.

   b. From the Collection list on the Edit Members form, search for and select the following roles:
      - snc_platform_rest_api_access
      - oauth_user
      - sn_samp_ibm_lic.sam_ibm_data_integrator

   c. Select the Add button  to move the selected roles from the Collection list to the Roles List.

   d. Select **Save**.
      The Edit Members form closes and you automatically return to the User form.

   e. Verify that all selected roles appear on the **Roles** related tab.

Configuring the API authentication method for the Anglepoint integration

You can configure the API authentication method that grants users access to the Anglepoint integration resources on your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The APIs that are used by the Anglepoint integration support both basic authentication and OAuth 2.0 authentication. Basic authentication uses standard usernames and passwords to grant users access to the resources on your ServiceNow instance. OAuth 2.0 authentication uses OAuth tokens to grant users access to those resources. To configure basic authentication, refer to either Configure a REST message with basic auth or Enable basic authentication for outbound SOAP. To configure OAuth 2.0 authentication, refer to Configure OAuth 2.0 authentication for the Anglepoint integration.

Configure OAuth 2.0 authentication for the Anglepoint integration

Configure OAuth 2.0 authentication to enable users to access Anglepoint integration resources through APIs using OAuth tokens.

Before you begin

Role required: admin

Procedure

1. From your ServiceNow instance, create an OAuth API endpoint.

   The Anglepoint Elevate platform uses the OAuth API endpoint to request the OAuth tokens that authorize access to the Anglepoint integration resources on your ServiceNow instance.

   Refer to Create an endpoint for clients to access the instance for instructions on how to create an OAuth API endpoint.

   > **Important:** After you successfully create an OAuth API endpoint, copy the values in the **Client ID** and **Client Secret** fields. Save them in a secure location for later use.

2. From the Anglepoint Elevate platform, create an API connection to your ServiceNow instance.

   The API connection enables you to securely transfer data between the Anglepoint Elevate platform and your ServiceNow instance.

Result

The Anglepoint Elevate platform sends the credential information that you specified for your API connection to `https://<servicenow-instance-url>.service-now.com/oauth_token.do` using an HTTP Post request. Your ServiceNow instance responds to the request by generating OAuth tokens and then sending them to the Anglepoint Elevate platform. The Anglepoint Elevate platform can then use these tokens to make API requests for accessing the Anglepoint integration resources on your ServiceNow instance.

View the daily aggregated peak usage of your IBM software products

View the highest daily sub-capacity and full capacity Processor Value Unit (PVU), Resource Value Unit (RVU), and Virtual Processor Core (VPC) usage for your IBM software products based on the edition, license metric, and region of each product.

Before you begin

Role required: sam_admin or sam_user

About this task

> **Note:** The highest daily usage of an IBM Cloud Pak is based on the Cloud Pak as a whole and not the individual software products, also known as Bundled Programs, within the Cloud Pak.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From your ServiceNow instance, navigate to **Workspaces** > **Software Asset Workspace**. The Software Asset Workspace launches in a new tab.
2. Open the License operations view.
3. From the left navigation menu of the License operations view, navigate to **IBM ASP Integration** > **Daily aggregated peak usage**.
4. View additional usage details for a given IBM software product by selecting the value in the corresponding **Date** field.

View devices with the highest daily usage of your IBM software products

View the breakdown for the highest daily usage of your IBM software products by physical host based on both the edition and license metric of each product.

Before you begin
Role required: sam_admin or sam_user

About this task

Note: The highest daily usage of an IBM Cloud Pak is based on the Cloud Pak as a whole and not the individual software products, also known as Bundled Programs, within the Cloud Pak.

Procedure

1. From your ServiceNow instance, navigate to **Workspaces** > **Software Asset Workspace**. The Software Asset Workspace launches in a new tab.
2. Open the License operations view.
3. From the left navigation menu of the License operations view, navigate to **IBM ASP Integration** > **Daily high water mark usage**.
4. View the list of physical hosts with the highest daily usage of your IBM software products.

View product classifications for your IBM components

View the product classifications for all IBM components that are installed in your environment. These product classifications enable you to track and manage licensing for your IBM components.

Before you begin
Role required: sam_admin or sam_user

Procedure

1. From your ServiceNow instance, navigate to **Workspaces** > **Software Asset Workspace**. The Software Asset Workspace launches in a new tab.
2. Open the License operations view.
3. From the left navigation menu of the License operations view, navigate to **IBM ASP Integration** > **Product classification**.
4. View the product classifications for all IBM components that are installed in your environment. Each product classification includes the classified product, product edition, product version, and assigned license metric.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Specify VMMs for IBM licenses

Specify the virtual machine managers (VMMs), such as VMware vCenter Servers and IBM Hardware Management Consoles (HMCs), for which you want to track IBM licenses. You can track licenses for IBM software that is discovered within these specified VMMs only.

Before you begin

Role required: sam_admin or sam_user

About this task

Note: Nutanix and public cloud environments do not require this step.

Procedure

1. From your ServiceNow instance, navigate to **Workspaces** > **Software Asset Workspace**. The Software Asset Workspace launches in a new tab.
2. Open the License operations view.
3. From the left navigation menu of the License operations view, navigate to **IBM ASP Integration** > **Devices to scan**.
4. Select **New**.
5. On the IBM Licensing VM Manager form, fill in the fields.

IBM Licensing VM Manager form

Field	Description
VM Manager	VMM for which you want to track IBM licenses.
Type	Type of VMM. Select one of the following options: ○ **vCenter** ○ **ESX Server** ○ **HMC** ○ **All AIX Servers**

6. Select **Submit**.

Deduplicating IBM software installations

To manage your IBM licenses, you can integrate the IBM publisher pack with an Authorized SAM Provider (ASP), IBM License Metric Tool (ILMT), or BigFix Inventory. If you are switching between an ASP integration and either an ILMT or BigFix Inventory integration, you can deduplicate software installations that have the same edition, version, and language but are discovered through different sources.

If you discover the same IBM software installation through multiple sources, such as Anglepoint and ILMT, the Software Asset Management application creates a separate software installation record for each discovery of that software installation. You can resolve these duplicate software installation records by running the *SAM - Deduplicate Install Table* scheduled job, which ensures that only one duplicate software installation record is marked as active and included in reconciliation. See Duplicate software installations in the Software Asset Management application for more information on deduplication.

By default, the Software Asset Management application prioritizes IBM software installations that are discovered through ILMT or BigFix Inventory. When you run the *SAM - Deduplicate*

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Install Table scheduled job, records for all IBM software installations that are discovered through ILMT or BigFix Inventory are marked as active, while records for the same software installations that are discovered through an ASP are marked as inactive. If an IBM software installation is discovered through an ASP only, the corresponding record is marked as active.

To prioritize IBM software installations that are discovered through ASPs instead, you can update the value of the **Use Servicenow Software Asset Management and Discovery for IBM license compliance** property (*com.snc.samp.ibm.use_samp_ibm_licensing*) by navigating to **All** > **System Properties** > **All Properties**. From the list of available system properties, search for and select the *com.snc.samp.ibm.use_samp_ibm_licensing* property. When the system property record opens, set the **Value** field to `true` and then select **Update**. Each time you subsequently run the *SAM - Deduplicate Install Table* scheduled job, records for all IBM software installations that are discovered through an ASP are marked as active, while records for the same software installations that are discovered through ILMT or BigFix Inventory are marked as inactive. If an IBM software installation is discovered through ILMT or BigFix Inventory only, the corresponding record is marked as active.

Note: The **Use Servicenow Software Asset Management and Discovery for IBM license compliance** property supports domain separation.

Enable IBM reconciliation for specific domains

If you are using domain separation for the integration between the Software Asset Management publisher pack for IBM and an Authorized SAM Provider (ASP), enable IBM reconciliation only for specific domains.

Before you begin
Role required: asset or domain_admin

Procedure

1. Open the Domain Asset Process Settings [alm_domain_asset_process_setting] table by navigating to **All** > **alm_domain_asset_process_setting_list.do**.
2. Double-click the **Run asset process** field for the domain that you want to enable reconciliation for.
3. When prompted, set the value to **true** and then select the Save icon .
4. Repeat steps 2 and 3 for each domain that you want to enable reconciliation for.

Important: If you have both parent and child domains, you can enable reconciliation for either the parent domain or child domain. You cannot enable reconciliation for both parent and child domains.

Verify the meta data for your IBM hosts

To improve the accuracy of your IBM license calculations, verify the meta data for the physical hosts that your IBM software is installed on. Update any meta data that is incorrect or out of date.

Before you begin
Role required: sam_admin or sam_user

Procedure

1. From your ServiceNow instance, navigate to **Workspaces** > **Software Asset Workspace**. The Software Asset Workspace launches in a new tab.
2. Open the License operations view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. From the left navigation menu of the License operations view, navigate to **IBM ASP Integration** > **Device settings**.
4. Verify the meta data for all available hosts.
5. If any of the following meta data is incorrect, update it.
   - IBM PVUs per core
   - Region

     Note: If the Region meta data is empty for any of your physical hosts, the **Default Region for IBM Devices** (*sn_samp_ibm_lic.default_region*) Software Asset Management property automatically associates those hosts with a default region. By default, this system property is set to **North America and South America**. However, you can also set this system property to **Europe and Africa** or **Asia and Australia**. License usage can be calculated only for physical hosts that are associated with a region. See Software Asset Management properties for more information on this property.

   - Usage type

   Note: You cannot update the Device, PVU Comment, and IBM PVU mapping meta data.

   a. Double-click the value in the incorrect meta data field.

   b. When prompted, enter or select the correct value and then select the Save icon . The meta data field updates with the correct value.

Software Publisher Analytics dashboard for IBM in Software Asset Management classic

View compliance analysis results related to IBM on the Software Publisher Analytics dashboard in the Software Asset Management classic application.

Access the Software Publisher Analytics dashboard by navigating to **All** > **Software Asset** > **Publisher Overview**.

Note: The add-on IBM publisher pack (com.sn_samp_ibm) plugin must be installed to view the IBM dashboard tab.

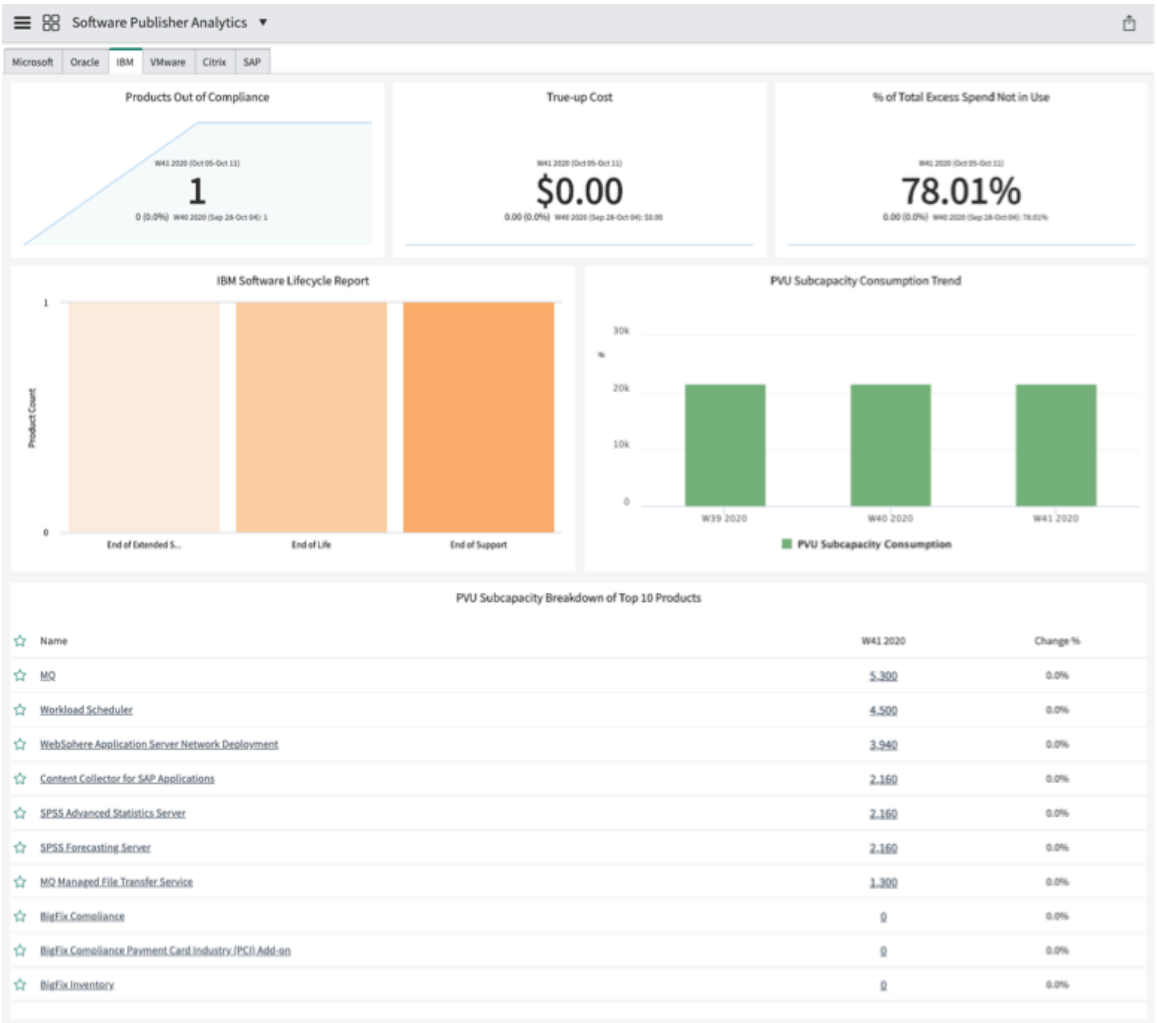
IBM License Metric Tool (ILMT) integration must be set up to view compliance information.

Results are updated whenever a new reconciliation result is available. You can save charts in PNG or JPG format.

IBM dashboard

You can manage IBM software using the IBM publisher pack.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



IBM tab

Report	Source list	Description
Products out of Compliance	Product Results [samp_product_result]	Number of products that have at least one software model out of compliance. Select the report to view the results in the License Workbench.
True-up Cost	Product Results [samp_product_result]	Cost to be compliant based on the average prices for entitlements for the rights.
% of Total Excess Spend Not In Use	Software Entitlements [alm_license]	Sum of the over-licensed amount over the total of licensed amount.
PVU Subcapacity Consumption Trend	IBM Peak Consumption [samp_ilmt_sw_install]	Comparison of the aggregate peak consumption for all products over time.
IBM Software Lifecycle Report	Software Lifecycle Report	Number of products in each software lifecycle phase,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

IBM tab (continued)

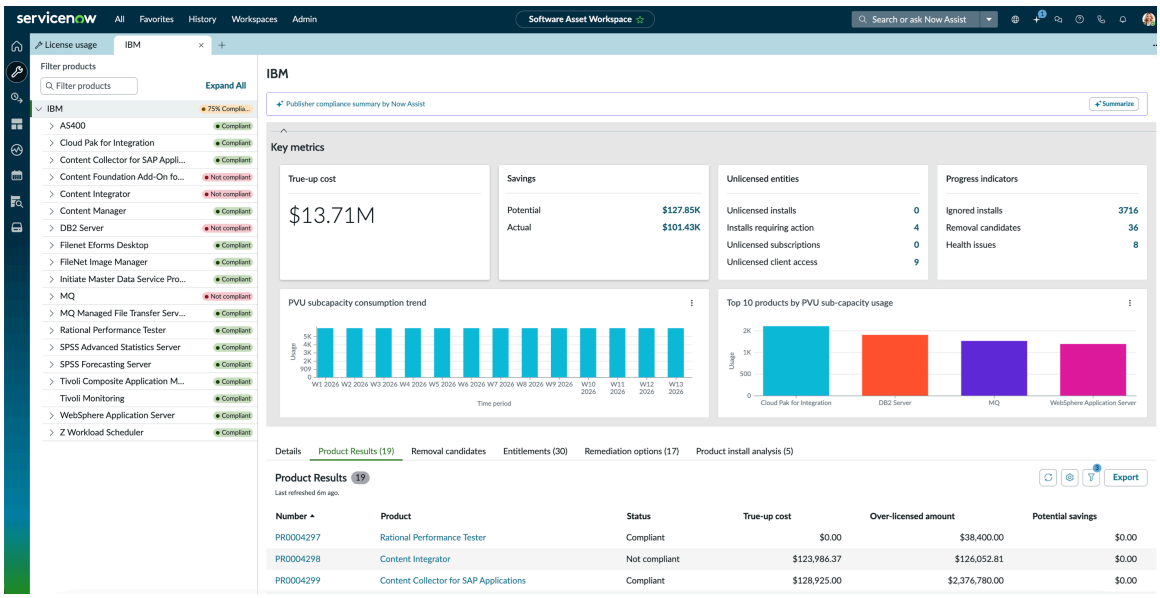
Report	Source list	Description
	[sam_sw_product_lifecycle_report]	including End of Extended Support, End of Life, and End of Support.
PVU Subcapacity Breakdown of Top 10 Products	IBM Peak Consumption [samp_ilmt_sw_install]	Peak PVU utilization for the top 10 IBM products.

Publisher overview for IBM in the Software Asset Workspace

View license usage information related to IBM in the publisher overview for IBM in the Software Asset Workspace.

From the Software Asset Workspace, access the IBM publisher overview by navigating to **License usage** > **Publishers** and then selecting **IBM** from the list of available software publishers.

Results are updated whenever a new reconciliation result is available.



You can view a summary of your license usage information in the Summary section of the IBM publisher overview.

IBM Summary

Report	Description
True-up cost	Cost to be compliant based on the average price of rights in your IBM software entitlements.
Potential savings	Potential cost savings for your IBM licenses.
Actual savings	Actual cost savings for your IBM licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

IBM Summary (continued)

Report	Description
	• **Unlicensed installs**: Total number of unlicensed IBM software installations. Select the number to view the complete list of unlicensed IBM software installations. • **Installs requiring action**: Total number of IBM software installations that you must take action on. Select the number to view the complete list of these IBM software installations. • **Unlicensed client access**: Total number of unlicensed IBM client access records. Select the number to view the complete list of unlicensed IBM client access records.
Progress indicators	Summary of your license compliance progress. This summary includes the following indicators: • **Ignored installs**: Total number of IBM software installations that were ignored during reclamation. Select the number to view the complete list of ignored IBM software installations. • **Removal candidates**: Total number of IBM removal candidates. Select the number to view the list of all software removal candidates.
PVU subcapacity consumption trend	Comparison of the aggregate peak consumption for all IBM software products over time.
Top 10 products by PVU sub-capacity usage	Peak PVU utilization for your top 10 IBM software products.

For more details on the license usage information that is provided in the publisher overview, see License usage publisher fields in workspace.

Software Asset Management for Red Hat Enterprise Linux

Use the Software Asset Management publisher pack for IBM to track and optimize licensing for your Red Hat Enterprise Linux (RHEL) products.

Required plugins and applications for Red Hat Enterprise Linux

To manage licenses for your RHEL products, request and activate the Software Asset Management Professional for IBM plugin (com.sn_samp_ibm) from the Now Support service portal. See Request Software Asset Management for more information on how to request and activate this plugin.

You must also request and install the CMDB CI Class Models application from the ServiceNow Store. This application contains the tables that store RHEL data on your ServiceNow instance and is required for RHEL reconciliation.

The ServiceNow® Discovery application uses the Red Hat Virtualization (RHV) discovery pattern to locate RHV components. To enable the discovery of these resources, you must install the Discovery and Service Mapping Patterns application from the ServiceNow Store.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Supported license types

The IBM publisher pack supports licensing for both Red Hat Enterprise Linux Server and Red Hat Enterprise Linux for Virtual Datacenters. The supported license metrics are socket-pair based and core-based.

Red Hat Enterprise Linux socket-pair based licensing

The Software Asset Management publisher pack for IBM supports socket-pair based licensing rules for Red Hat Enterprise Linux Server and Red Hat Enterprise Linux for Virtual Datacenters.

Overview of the socket-pair based licensing model

Red Hat Enterprise Linux Server

Red Hat Enterprise Linux Server enables Linux distributions in physical, virtual, and hybrid environments. Although you can use RHEL licenses in both low-density and high-density virtual environments, they're more cost efficient in low-density virtual environments.

To determine whether a virtual environment is low-density or high-density, divide the number of required RHEL Server rights by the number of required RHEL for Virtual Datacenters rights. Compare this value against the threshold value in the **Red Hat Enterprise Linux for Virtual Datacenters license cost optimization threshold** field that you defined in your Software Asset Management properties. If your value is lower than the threshold value, then the virtual environment is considered low-density. If your value is equal to or higher than the threshold value, then the virtual environment is considered high density.

Note: The default value for the **Red Hat Enterprise Linux for Virtual Datacenters license cost optimization threshold** field is 3.2. This value is based on the ratio of the current RHEL Server subscription list price to the current RHEL for Virtual Datacenters subscription list price. If your entitlements contain different pricings for these products, then you can calculate this value by dividing your RHEL for Virtual Datacenters subscription price by your RHEL Server subscription price.

RHEL uses different licensing models depending on the environment in which you deploy a server.

RHEL licensing models

Environment	Description	Licensing model	Cluster licensing model	Cloud licensing model
Physical	Deployment of RHEL servers on physical hosts.	Licensing is based on the number of socket-pairs on the physical host that is running a RHEL server. Each socket-pair requires one right. For example, if you're running	Licensing is based on the total number of socket-pairs on all physical hosts that are running a RHEL server within a cluster. Each socket-pair requires one right. For example, if you're running a RHEL server on Cluster Host A, which has	N/A

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

RHEL licensing models (continued)

Environment	Description	Licensing model	Cluster licensing model	Cloud licensing model
		a RHEL server on a physical host with 10 sockets, you must use five rights to license the host. Single-socket hosts must be licensed individually. Each of these hosts requires one right.	10 sockets, and on Cluster Host B, which has 20 sockets, then you must use 15 rights to license the entire cluster.	
Virtual (low-density and high density)	Deployment of RHEL servers on the VMs that are running on physical hosts.	Licensing is based on the number of VM pairs that are running a RHEL server within a physical host. Each VM pair requires one right. For example, if you're running a RHEL server on six VMs within a physical host, you must use three rights to license those VMs. Single VMs must be licensed individually. Each of these VMs requires 0.5 rights.	Licensing is based on the total number of VM pairs that are running a RHEL server within a cluster. For example, if you're running a RHEL server on a total of 10 VMs within a cluster, you must use five rights to license the entire cluster.	Licensing is based on the number of VMs that are running a RHEL server within a cloud environment. Each VM requires 0.5 rights. For example, if you're running a RHEL server on four VMs within a cloud environment, such as Amazon Web Services (AWS), you must use two rights to license those VMs.
Hybrid	Deployment of RHEL servers on physical hosts and	Licensing is based on a combination of the following:	Licensing is based on a combination of the following:	Licensing is based on the number of VMs that are running a RHEL server

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

RHEL licensing models (continued)

Environment	Description	Licensing model	Cluster licensing model	Cloud licensing model
	on the VMs that are running on those hosts.	• The number of socket-pairs on the physical host that is running a RHEL server. • The number of VM pairs that are running a RHEL server within that same physical host. Each socket-pair and VM pair requires one right. For example, if you're running a RHEL server on a physical host with 10 sockets and on 20 VMs within that host, you must use a total of 15 rights to license the host and VMs.	• The total number of socket-pairs on all physical hosts that are running a RHEL server within a cluster. • The total number of VM pairs that are running a RHEL server within that same cluster. Each socket-pair and VM pair requires one right. For example, if you're running a RHEL server on Cluster Host A, which has 10 sockets; on Cluster Host B, which has 20 sockets; and on 10 VMs within Cluster Host A, you must use 20 rights to license the entire cluster.	within a cloud environment. Each VM requires 0.5 rights. **Note:** This licensing model is applicable only for RHEL servers that are running on VMs. For example, if you're running a RHEL server on four VMs within a cloud environment, such as Amazon Web Services (AWS), you must use two rights to license those VMs.

Red Hat Enterprise Linux for Virtual Datacenters

Red Hat Enterprise Linux for Virtual Datacenters uses hypervisors, such as Red Hat Virtualization and VMware, to enable Linux distributions in both low-density and high-density virtual environments. RHEL for Virtual Datacenters licenses are more cost efficient in high-density virtual environments.

To determine whether a virtual environment is low-density or high-density, divide the number of required RHEL Server rights by the number of required RHEL for Virtual Datacenters rights. Compare this value against the threshold value in the **Red Hat Enterprise Linux for Virtual Datacenters license cost optimization threshold** field that you defined in your Software Asset Management properties. If your value is lower than the threshold value, then the virtual environment is considered low-density. If your value is equal to or higher than the threshold value, then the virtual environment is considered high density.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The default value for the **Red Hat Enterprise Linux for Virtual Datacenters license cost optimization threshold** field is 3.2. This value is based on the ratio of the current RHEL Server subscription list price to the current RHEL for Virtual Datacenters subscription list price. If your entitlements contain different pricings for these products, you can calculate this value by dividing your RHEL for Virtual Datacenters subscription price by your RHEL Server subscription price.

RHEL for Virtual Datacenters licensing is based on the total number of socket-pairs across all physical hosts within a cluster, regardless of whether or not the hosts are currently running VMs with installations. With this license type, you don't need to license the VMs that are running a RHEL for Virtual Datacenters server because you can access an unlimited number of VMs from your physical hosts. Single-socket hosts must be licensed individually.

Note: Although Red Hat permits you to license a subset of hosts when VM mobility is restricted, this licensing scenario is not currently supported by the Software Asset Management application.

If you deploy a RHEL for Virtual Datacenters server on VMs within a cluster, licensing is based on the total number of socket-pairs on all hosts that are running those VMs. Since you can access an unlimited number of VMs from your physical hosts, you don't need to license the cluster based on the total number of VMs that are running the server within the cluster. For example, if Cluster Host A has 10 sockets and 20 VMs while Cluster Host B has 20 sockets and 60 VMs, you must use 15 RHEL for Virtual Datacenters rights to license the entire cluster.

License consumption order

If you have both RHEL Server and RHEL for Virtual Datacenters licenses, consume them in the following order:

1. RHEL for Virtual Datacenters licenses on the physical hosts, VMs, or clusters that have allocated licenses.
2. RHEL Server licenses on the physical hosts, VMs, or clusters that have allocated licenses.
3. RHEL for Virtual Datacenters licenses on physical hosts, VMs, or clusters in high-density virtual environments.
4. RHEL Server licenses on physical hosts, VMs, or clusters in low-density virtual environments.
5. RHEL Server licenses on physical hosts, VMs, or clusters in high-density virtual environments. Use this license type only if you have run out of RHEL for Virtual Datacenters licenses in high-density virtual environments.
6. RHEL for Virtual Datacenters licenses on physical hosts, VMs, or clusters in low-density virtual environments. Use this license type only if you have run out of RHEL Server licenses in low-density virtual environments.

Red Hat Enterprise Linux core-based licensing

The Software Asset Management publisher pack for IBM supports core-based licensing rules for RHEL products in both physical and virtual environments.

Overview of the Per Core licensing model

To license a software product under the Per Core licensing model, each server must be assigned an appropriate number of core licenses. The number of core licenses needed depends

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

on whether you're licensing the physical server or an individual virtual operating system environment (OSE).

Licensing under the Per Core model offers the following benefits:

- Tracks core packs for Red Hat products.
- Imports entitlements with the number of rights per license pack and the number of packs for Red Hat core-based entitlements.
- Enables customers to enter the number of rights per license pack and the number of packs for any Red Hat core-based product.
- Calculates the purchased rights based on the number of rights per license pack multiplied by the number of packs.
- Creates and removes allocations based on reconciliation of Red Hat core-based products.

Allocations can be applied to virtual machines (VM) or only to hosts. This metric runs calculations for physical cores and virtual cores on each machine and presents the most optimal licensing model based on the number of rights used.

Total license requirement calculation

Total license requirement is calculated at the physical host level. The following table includes examples of the various use cases for total license requirement:

Total license requirement calculations

Environment	Description	License requirement
Physical	Deployment of RHEL core-based products on physical machines.	Licensing is based on the total number of physical cores on the machine. The total number can be found by multiplying the number of sockets by the number of cores per socket. For example, say that a physical machine has 2 sockets and 8 cores per socket. Multiplying 2 by 8 would mean that the total number of physical cores would be 16. 2 * 8 = 16 Thus, the total number of rights required is 16 cores.
Virtual	Deployment of RHEL core-based products on the VMs that run on physical hosts.	Licensing is based on the total number of cores assigned to the VMs that run the server on a physical host. This number is limited to the maximum capacity of the physical host. For example, say that a physical host has 2 sockets with 8 cores per socket and 6 VMs with 2 cores per VM. Each VM has installed a RHEL

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Total license requirement calculations (continued)

Environment	Description	License requirement
		core-based product. In this case, the number of rights required equals the minimum value between the physical core capacity of the physical host and the number of non-hyperthreaded physical cores assigned to VMs. 2 sockets multiplied by 8 cores per socket equal 16 cores, and 6 VMs multiplied by 2 cores per VM equal 12 cores. The minimum value between the two is 12 cores. `Min(2*8 = 16, 2*6 = 12)` Thus, the total number of rights required is 12 cores.
Hybrid	Deployment of RHEL core-based products on the physical hosts and on the VMs that run on those physical hosts.	Licensing is based on the number of physical cores on which the RHEL core-based application is installed. For example, a physical host has 2 sockets with 8 cores per socket and 20 VMs with 2 cores per VM. A RHEL core-based product is installed on the physical host and all 20 VMs. In this case, the number of rights required is the minimum value between the physical core capacity of the physical host and the number of non-hyperthreaded physical cores assigned to VMs added to the number of physical hosts. 2 sockets multiplied by 8 cores per socket equal 16 cores. Then, 2 cores multiplied by 8 cores equal 16 cores, and 20 VMs multiplied by 2 cores per VM equal 40 cores. Add 16 cores to 40 cores, and it equals 56 cores. The minimum value between the two is 16 cores. `Min((2*8) = 16, (2*8 + 2*20) = 56)` Thus, the total number of rights required is 16 cores.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Red Hat Enterprise Linux entitlements

Software entitlements define the license details for your Red Hat Enterprise Linux (RHEL) products. You can create individual entitlements or import a list of entitlements from a spreadsheet.

Important: You can create and import entitlements in both the Software Asset Management classic application and the Software Asset Workspace. The following sections provide details on how to create and import entitlements in the Software Asset Management classic application. For details on how to create entitlements in the Software Asset Workspace, see Create entitlements in workspace. For details on how to import entitlements in the Software Asset Workspace, see Import bulk entitlements in workspace.

Create entitlements for Red Hat Enterprise Linux

Create individual software entitlements for your Red Hat Enterprise Linux (RHEL) products.

Before you begin

Role required: sam_user or sam_admin

Important: You can create entitlements in both the Software Asset Management classic application and the Software Asset Workspace. The following steps provide details on how to create entitlements in the Software Asset Management classic application. For details on how to create entitlements in the Software Asset Workspace, see Create entitlements in workspace.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **Software Entitlement**.
2. Select **New**.
3. On the form, fill in the fields.

Software Entitlement form

Field	Value
Display name	Name of the software entitlement. This field is automatically set based on the **Asset tag** and **Software model** fields.
Asset tag	Serial number and bar code that are used to identify and track the asset.
Publisher part number	Publisher part number (PPN) for the entitlement.
Software model	Software model that has the entitlement.
Agreement type	Type of license agreement. Possible values include the following: ○ Generic ○ Enterprise License Agreement (ELA)
License type	Type of license. Set this field to **Subscription**.
Subscription period	Length of time for which the subscription is valid. This field appears only when **Subscription** is selected from the **License type** field.
Start date	Date when the subscription begins. This field appears only when **Subscription** is selected from the **License type** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
End date	Date when the subscription expires. Do not select a date if the subscription does not expire. This field appears only when **Subscription** is selected from the **License type** field.
Metric group	Software publisher or software bundle that predefined software calculations are assigned to. Select **Red Hat**.
License metric	Group of predefined software calculations that are assigned to a metric group. Software Asset Management uses license metrics to calculate the rights for a specific set of software products during reconciliation. License metric options are based on the software publisher or software bundle that you select from the Metric group list. Possible values include the following: ○ Per Socket-pair ○ Per Core
Rights per license pack	Total number of rights associated with each pack that you purchased for Red Hat. This field appears only when **Per Core** is selected from the **License metric** field.
Purchased rights	Total number of rights that you purchased.
Active rights	Total number of rights that you can allocate to your users or devices. This field is set automatically.
Allocations available	Number of active rights that you have not yet allocated to any user or device. This field is set automatically.
Unit cost	Cost of each software right.
Total cost	Total cost of your purchased rights. This field is automatically set based on the **Purchased rights** and **Unit cost** fields.

4. Select **Submit**.

Import entitlements for Red Hat Enterprise Linux

Import a list of Red Hat Enterprise Linux (RHEL) software entitlements from a spreadsheet.

Before you begin

Role required: sam_admin

Important: You can import software entitlements in both the Software Asset Management classic application and the Software Asset Workspace. The following steps provide details on how to import software entitlements in the Software Asset Management classic application. For details on how to import software entitlements in the Software Asset Workspace, see Import bulk entitlements in workspace.

Procedure

1. Download the spreadsheet template for the software entitlement import.

   a. On the page header of your ServiceNow® instance, select **All**.

   b. In the menu navigation filter, enter `samp_bulk_import_list.do`.
   The Entitlement Imports [samp_bulk_import] table opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select **New**.

d. On the Entitlement Import form, select **Download template**.

2. Fill in the spreadsheet with all software entitlements that you want to import.
3. Import your software entitlements into your ServiceNow instance.

a. On the page header of your ServiceNow® instance, select **All**.

b. In the menu navigation filter, enter `samp_bulk_import_list.do`.
The Entitlement Imports [samp_bulk_import] table opens.

c. Select **New**.

d. On the form, fill in the fields.

Entitlement Import form

Field	Description
Import type	Type of document that you are importing software entitlements from. The options are **Standard import document** and **Microsoft license statement (MLS)**. Set this field to **Standard import document**.
File	Spreadsheet of software entitlements that you want to import. Select **Click to add...** to search for and select the same spreadsheet that you filled out in step 2.
Description	Brief description of the software entitlement import.

e. Select **Import**.

Result
All software entitlements are imported into your ServiceNow instance.

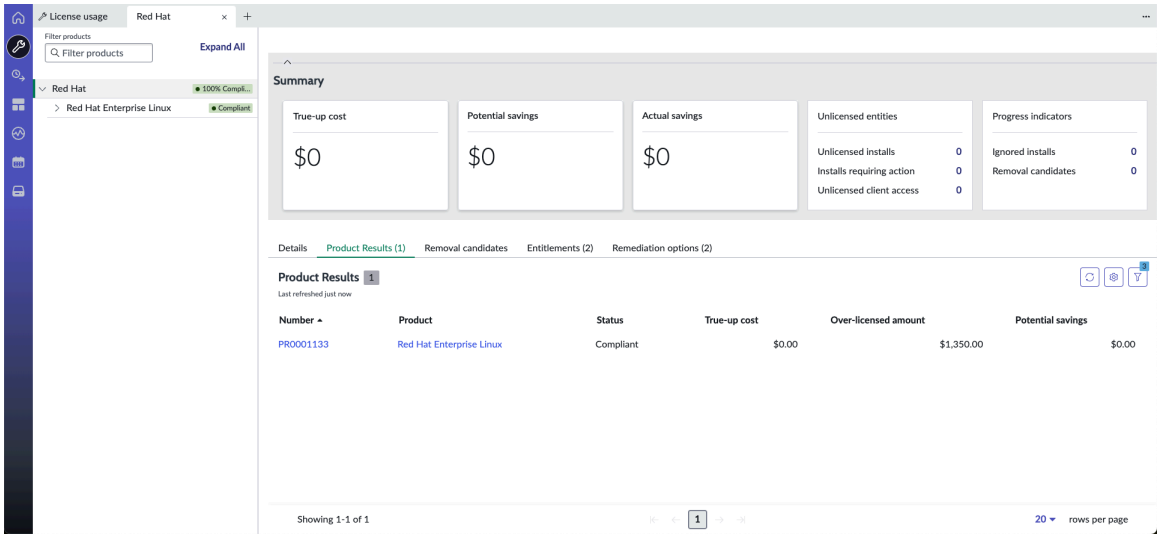
Publisher overview for Red Hat in the Software Asset Workspace

View license usage information related to Red Hat Enterprise Linux (RHEL) in the publisher overview for Red Hat in the Software Asset Workspace.

From the Software Asset Workspace, access the Red Hat publisher overview by navigating to **License usage** > **Publishers** and then selecting **Red Hat** from the list of available software publishers.

Results are updated whenever a new reconciliation result is available.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



You can view a summary of your license usage information in the Summary section of the Red Hat publisher overview.

Red Hat Summary

Report	Description
True-up cost	Cost to be compliant based on the average price of rights in your RHEL software entitlements.
Potential savings	Potential cost savings for your RHEL licenses.
Actual savings	Actual cost savings for your RHEL licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information: • **Unlicensed installs**: Total number of unlicensed RHEL software installations. Select the number to view the complete list of unlicensed RHEL software installations. • **Installs requiring action**: Total number of RHEL software installations that you must take action on. Select the number to view the complete list of these RHEL software installations. • **Unlicensed client access**: Total number of unlicensed RHEL client access records. Select the number to view the complete list of unlicensed RHEL client access records.
Progress indicators	Summary of your license compliance progress. This summary includes the following indicators: • **Ignored installs**: Total number of RHEL software installations that were ignored during reclamation. Select the number to view the complete list of ignored RHEL software installations. • **Removal candidates**: Total number of RHEL removal candidates. Select the number to view the list of all software removal candidates.

For more details on the license usage information that is provided in the publisher overview, see License usage publisher fields in workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management publisher pack for Microsoft

The Software Asset Management publisher pack for Microsoft helps you track your license compliance position using Microsoft licensing metrics.

Important: To use the publisher pack, activate the Software Asset Management Professional for Microsoft plugin (com.snc.samp.microsoft).

Microsoft offers a wide variety of products that span from database servers to subscription services. Each Microsoft product follows its own licensing model, which can make it hard to track your license compliance position. With the Software Asset Management publisher pack for Microsoft, you can accurately track your license compliance position for Microsoft products. Reconciliation identifies licenses that are out of compliance and provides a list of remediation options. For more information, see Software reconciliation for compliance.

To learn more about Microsoft licensing models, see Microsoft licensing.

Set up ServiceNow Discovery to identify Microsoft installations on your network. For more information, see Data collected by ITOM Visibility.

Licensing models

The Software Asset Management publisher pack for Microsoft supports the following licensing models.

- Per User
- Per Device
- Per Core
- Per Core (with CAL)
- User CAL
- Device CAL
- Server (per instance)
- Server (per server)
- Per Processor
- User Subscription
- Software Assurance

For more information, see Supported Microsoft license types.

If a PPN with a P+SA license type lacks a version assignment, a software model with the exact version is automatically applied. This automatic version assignment occurs both when creating an entitlement and when importing entitlements from a Microsoft License Statement (MLS). This automatic action correctly applies Microsoft assurance benefits to an entitlement. For details on the upgrade history of an entitlement, navigate to **Workspaces** > **Software Asset Workspace** > **License operations** > **Software entitlements** > **Upgrade history**.

The *SAMP - Update generic PSA entitlements* fix script automatically updates the existing P+SA entitlements with version as anything, with the specific version, and applies the appropriate licensing terms.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Permission types

The Software Asset Management publisher pack for Microsoft supports the following permission types to access data through Microsoft APIs. You can select the appropriate type of permission for your application to access data correctly and securely.

- **Delegated type permission**

  These permissions enable the application to access data on behalf of a signed-in user, which means the application can access only the data that a signed-in user has access to.

- **Application type permission**

  These permissions enable the application to access data without a signed-in user. The application can access any data that the permission is associated with.

Related topics

Software license maintenance

License metrics for Microsoft products

Microsoft Per Core licensing rules

Microsoft Per Core (with CAL) licensing rules

Microsoft 365 integration

Microsoft 365 integration

Create an integration with Microsoft 365 to download subscription information that is compared with software installations for compliance.

Microsoft 365 products and services

Microsoft 365 is a suite of software products that includes a range of subscription software and services such as Microsoft Office 365, Windows, and Enterprise Mobility and Security (EMS). Microsoft 365 and EMS include many other products and services within them.

Some of these products can be installed on a computer, while others are online services accessible via the internet.

Note: Microsoft allows users to install Microsoft 365 products on multiple devices, although users can only sign in on a maximum of five devices at one time. For more information, see How sign in works in Microsoft 365.

Microsoft 365 admin center includes many other products that you can purchase and activate. However, some of these products don't come with the Microsoft 365 subscription, such as Dynamics 365.

The following are some of the products and services that are available with the Microsoft 365 subscription:

- Microsoft 365
- Microsoft Exchange Online
- Enterprise Mobility Suite
- Microsoft Office 365
- Microsoft SharePoint Online
- Microsoft Entra ID

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Microsoft Power BI
- Microsoft OneDrive
- Microsoft Teams
- Windows
- Microsoft Intune

Important: This list doesn't include all the products and services available with a Microsoft 365 subscription.

Microsoft 365 subscription plans

Microsoft 365 offers various subscription plans, each providing access to different products and services. For instance, Power BI is included in the Office 365 E5 plan but not in the Office 365 E3 plan. To understand more about Microsoft 365 Enterprise subscription, see Microosft 365 plans and pricing. . To understand more about all products and services per subscription plan, see Microsoft 365 licensing .

Benefits of Microsoft 365 integration

SAM managers can perform the following actions:

- Get user subscription information for all the Microsoft 365 plans purchased on the Microsoft 365 admin center, such as Microsoft Office 365, Microsoft 365.
- Determine license compliance of Microsoft 365 subscriptions by reconciling user subscription, entitlement, and software installations.
- View active, inactive, and unassigned subscriptions by their last activity date.
- Get user activity for individual Microsoft Office 365 software products within Microsoft 365 subscriptions. For more information, see Evaluating software usage activity for Microsoft 365 subscriptions.
- Get user activity with device-specific activation count details from the Microsoft 365 admin portal that helps in identifying users who have activated their Microsoft subscriptions on at least one device. The activation count also helps SAM managers accurately determine the total number of activations across both desktops and devices.
- Receive automated optimization recommendations and workflows for your Microsoft 365 subscriptions. These optimizations include suggestions for downgrading plans, addressing low usage, identifying overlapping licenses, and consolidating subscriptions.
- Determine potential savings while acting on the recommendation.
- Reduce costs and administrative efforts by automatically removing licenses that have low usage or are part of overlapping subscriptions.

Related topics

Integrating with Microsoft 365

Evaluating software usage activity for Microsoft 365 subscriptions

Publisher optimizations for Microsoft

Supported Microsoft 365 license types

The Microsoft 365 integration supports various Microsoft 365 license types

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Full USL

A Microsoft 365 Full USL is a user subscription license that provides full access to all features and capabilities of a Microsoft 365 subscription software product or service. You can use this license type under the following scenarios:

- If have not already purchased licenses for any on-premise Microsoft 365 subscription software products or services.
- If you want to transition from an on-premise to cloud-based Microsoft 365 subscription software product or service without using Microsoft Software Assurance (SA) benefits.

From SA USL

A Microsoft 365 From SA USL is a user subscription license that enables you to transition from a perpetual on-premise Microsoft software product or service to a corresponding cloud-based Microsoft 365 subscription software product or service, while maintaining certain Microsoft SA benefits. You can use this license type if you have already purchased a perpetual license for an on-premise Microsoft software product or service with active SA benefits.

Add-on USL

A Microsoft 365 Add-on USL is a user subscription license that enables you to try the features and capabilities of a cloud-based Microsoft 365 subscription software product or service while you are actively using the perpetual on-premise version of that product or service. With this license type, you can try the cloud version of a Microsoft software product or service without having to fully transition to the cloud. You can use this license type if you have already purchased a perpetual license for an on-premise Microsoft software product or service with active SA benefits.

Step-up license

A Microsoft 365 Step-up license enables you to upgrade a lower edition of a Microsoft 365 subscription software product or service to a higher edition without having to pay the additional full price for the higher edition. When you upgrade a software product or service through this license type, you are required to pay only the price difference between the lower and higher editions, thereby preserving your initial investment into the lower edition. You can use this license type if you have already purchased the license for a lower edition of a Microsoft 365 subscription software product or service. For more information on Step-up licenses, see Software license maintenance.

Reserve license

A Microsoft 365 reserve license enables you to place a license reservation order for a Microsoft 365 Online Services product. With a license reservation order, you can plan and provision additional resources for a Microsoft 365 Online Services product ahead of time without having to create a corresponding purchase order. All license reservation orders are realized during your true-up or annual order process. You can use this license type if you have already purchased a license for a Microsoft 365 Online Services product.

Integrating with Microsoft 365

Integrating the Software Asset Management application with the Microsoft 365 service enables you to track your software subscriptions and software usage to determine license compliance and act on optimization opportunities.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required?	Required user role in the Microsoft 365 application	Authentication scopes	Purpose	Least privilege?
Download subscriptions	Mandatory	Application developer	• User.Read.All • LicenseAssignment.Read.All	Permits the ServiceNow instance to read tenant, user, and license information to synchronize Microsoft 365 subscription data.	The user role and scope are read-only and limited to metadata access. It doesn't allow modifying users, groups, or licenses.
Pull user activity	Optional	• Application developer • Power platform administrator	Reports.Read.All	• Pulls usage of Microsoft 365 apps for Enterprise (Microsoft Word, Excel, PowerPoint), and other products such as Exchange Online, Teams, OneDrive, Power BI, SharePoint Online, Viva Engage (previously Yammer). Required for the Software Asset Management Professional application to generate optimization recommendations for low usage. For	• The role and scope are read-only and limited to metadata access. It doesn't allow modifying users, groups, or licenses. • For getting Power BI usage, this is the least privilege role. You should consider limiting membership to specific security groups and enabling read-only Power BI admin settings for the service principal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Setting up Microsoft 365 integration

Manage Microsoft 365 license compliance and optimization by performing the following steps:

- **Prerequisites**

  Before you begin with Microsoft 365 integration, confirm that all prerequisites are met.

  1. Install Software Asset Management Professional for Microsoft

     Install the Software Asset Management Professional for Microsoft (com.snc.samp.microsoft) plugin to access the Microsoft Publisher pack features in the Software Asset Management application.

  2. Install ITAM Health Check application

     Install the ITAM Health Check application to get an overview of your Software Asset Management configurations and receive recommendations for correcting errors.

  3. Install Software Asset Management - SaaS License Management plugin

     Install the Software Asset Management - SaaS License Management plugin (com.sn_sam_saas_int) to create and manage integrations with your SaaS and Single Sign-On (SSO) applications. These integrations enable you to track license usage and reclaim unused licenses effectively.

  4. Install Microsoft Entra ID Spoke

     Install the Microsoft Entra ID spoke (formerly Azure AD spoke) to enable automated integration with the Microsoft 365 Admin Center for license removal and other scenarios. An Integration Hub subscription is required for this spoke. For more information about Integration Hub, see Integration Hub.

  5. Receive latest updates from Software Asset Management Content Service

     Update your instance with new content twice every week on a scheduled basis through Software Asset Management Content Service. The Software Asset Management application provides automated content to simplify the normalization of software installations and subscriptions, offering enriched data such as lifecycle information, downgrade rights, and suite definitions. This data is essential for maintaining accurate license compliance and optimization.

  6. Create a success goal

     Create a success goal to track the success of Microsoft 365 configuration setup on the Software Asset Management application.

- **Software Asset Management configurations**

  Configure your Software Asset Management (SAM) application, which includes setting up user accounts, managing licenses, and confirming compliance with Microsoft's software usage policies.

  1. Register application on Microsoft Entra ID

     Register an application on Microsoft Entra ID (formerly Azure Active Directory) that enables the retrieval of all subscriptions provisioned in the Microsoft 365 admin center.

  2. Configure Power BI usage to get usage information

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enable service principal authentication for Power BI read-only APIs to enable your application access to Power BI service content and APIs. This access helps optimize your Microsoft 365 subscriptions, such as downgrading subscriptions from Office 365 E5 to Office 365 E3 or removing Power BI low-usage subscriptions.

3. Prevent anonymous user information

   By default, Microsoft hides the user names of subscribers in the Microsoft 365 Admin Center, preventing ServiceNow from accurately tracking Microsoft 365 license usage. To resolve this issue, disable this anonymization feature in the Microsoft 365 Admin Center.

4. Set up a Microsoft 365 integration profile

   Create a Microsoft 365 integration profile in the Software Asset Management application to import user subscription data, determine license compliance, and identify optimization opportunities. If you manage multiple tenants, create a separate integration profile for each.

5. Configure the integration profile to get data for government customers

   The ServiceNow AI Platform supports Microsoft 365 Government plans, offering all the features of Microsoft 365 services within a government-exclusive cloud. This setup helps organizations comply with the U.S. security and compliance standards.

6. Configure the integration profile to get usage for Microsoft 365 Copilot, Visio Online, and Project Online

   Microsoft doesn't provide APIs to get usage directly for Microsoft 365 subscription products, such as Microsoft Visio, Microsoft Project, and Microsoft Copilot. However, you can download activity reports for these products from the Microsoft 365 admin center. Microsoft 365 administrators can download these reports and SAM Admin can attach them unmodified to the integration profile in the Software Asset Management application. The scheduled jobs within ServiceNow will then process these reports and identify reclamation candidates if the usage is low.

7. Configure reclamation rules

   The Software Asset Management application automatically provides base system reclamation rules when you create an integration profile for Microsoft 365. For more information, see Reclamation rules for Microsoft 365 integration.

8. Configure user resolution rules

   Resolve or match the Microsoft 365 admin center user to the ServiceNow user (sys_user) to determine the right license compliance and provide correct optimization recommendations.

   > **Important:** Remember that sometimes licenses are assigned to non-human users such as email accounts. In these instances, you can skip the user resolution process as it isn't required.

9. Run scheduled jobs

   The Microsoft 365 integration profile you created automatically gets subscription and usage information from the Microsoft 365 admin center on a scheduled basis. You can now run these jobs on demand and verify they're completed successfully.

10. Set up software models and entitlements

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Software Asset Management application integrates with the Microsoft 365 admin center to generate software models automatically based on assigned subscriptions. These models include suite components, downgrades, and lifecycle details to confirm compliance and optimize licensing. For these automatically created software models, remember to add your entitlements. If you have previously set up entitlements using Publisher Part Number, the software models from that setup are used in this integration, avoiding the creation of duplicate models.

Note: Verify that no software models are created without Discovery Maps (DMAPs) and no entitlements are created without a Publisher Part Number (PPN) for a smoother implementation.

11. Set up Add on, From SA, and Step Up entitlements

    Associate an Add-on license with a perpetual office legacy license with active Software Assurance. Microsoft 365 offers various subscription types such as Full USL, Add On USL, From SA USL, Step-up license, and reserved licenses. To learn more about these licenses, see Supported Microsoft 365 license types.

12. Set up license reservations

    Create reserve entitlements for Microsoft online services to add licenses to your existing Microsoft 365 subscriptions.

- **Software Asset Management configurations verification**

  Review and validate the Software Asset Management configurations to track and manage Microsoft 365 licenses and usage accurately.

  1. Verify the complete pull of all subscriptions

     Verify with the Microsoft 365 administrator that all subscription records have been successfully pulled.

  2. Run health check

     Run a health check on the Health check dashboard by selecting **Microsoft 365**, **SaaS**, and **General** to verify the Microsoft 365 configurations and review the findings for each suite.

  3. Verify the pull of all required software usage

     Verify if the Software Asset Management application has pulled the usage details for your Microsoft 365 subscribed users, which is required to identify the last activity and determine optimization opportunities.

  4. Create a success goal

     Create a success goal to manage your Microsoft 365 licenses.

  5. Add Microsoft 365 and associated products to the published product list

     Add Microsoft 365 and associated products to the published product list to improve readability and declutter the Software Asset Workspace. Scale your SAM efforts strategically by evaluating progress based on resource needs, work quality, and configuration management.

  6. Run reconciliation

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Run reconciliation on the Software asset overview page to verify that the licenses are consumed according to the Software Asset Management configurations. You must run reconciliation only for Microsoft as the publisher to verify Microsoft 365 license consumption.

7. Check license position report

   Check your overall compliance positions for Microsoft 365 and associated products in the License Position Report.

8. Act on unlicensed subscriptions

   Identify and address the unlicensed Microsoft 365 subscriptions.

9. Act on optimization recommendations

   Software Asset Management supports various optimization use cases, which you can view on the Software asset analytics page.

Related topics

Microsoft 365 integration

Automated license removal for Microsoft 365

Software Asset Management software suites

Evaluating software usage activity for Microsoft 365 subscriptions

Register a Microsoft Entra ID application

Register an application through the Microsoft Entra ID portal.

Watch this short video for an introduction to registering an application through the Microsoft Entra ID portal.

https://player.vimeo.com/video/1162482385?h=abd3c6fb06&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Microsoft Entra ID Role required: Refer to the Minimal user permissions table.

Procedure

1. From a web browser, open the App registrations page of the Microsoft Entra ID portal.
2. Log in using your global administrator credentials.
3. On the App registrations page, select **New registration**.
4. In the Register an application form, enter a **Name** for the application.
5. In the **Supported account types** field, select **Accounts in any organizational directory (Any Microsoft Entra ID - Multitenant)**.
6. Under the **Redirect URI** field, select **Web** for the type of application you want to create and enter `https://<instance-name>.service-now.com/oauth_redirect.do`, where <instance-name> is the name of your ServiceNow instance.
7. Select **Register**.
   The application is registered and you're automatically redirected to the Overview page for the new application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. On the Overview page, copy the values in the **Application (client) ID** and **Directory (tenant) ID** fields.
   Save them in a secure location for later use.
9. Generate a Client secret for your application.

   a. From the side navigation menu, navigate to **Manage** > **Certificates & secrets**.
   The Certificates & secrets page opens.

   b. In the Client secrets section, generate a client secret for the application by selecting **New client secret**.

   c. In the dialog box, fill in the fields.

   Add a client secret dialog box

Field	Description
Description	Description of the client secret.
Expires	Time period after which you want the client secret to expire. The options are: ▪ In 1 year ▪ In 2 years ▪ Never

   d. Select **Add**.
   The dialog box closes and you return to the Certificates & secrets page.

   e. In the Client secrets section, copy the value in the **VALUE** field for the newly generated client secret.
   Save this value in a secure location for later use.

10. Specify the level of access that the application has to your protected resources.

    a. From the side navigation menu, navigate to **Manage** > **API permissions**.

    b. On the API permissions page, select **Add a permission**.

    c. In the Request API permissions dialog box, select the **Microsoft APIs** tab.

    d. From the list of available Microsoft APIs, select **Microsoft Graph**.

    e. When prompted to select the types of permissions that the application requires, select **Delegated permissions** or **Application permissions** according to your requirement.

    f. Under Select permissions, select the check boxes for the following permissions:
    - Reports.Read.All
    - User.Read.All
    - Organization.Read.All

    Important: Add Tenant.Read.All for Power BI delegated permissions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

g. Select **Add permissions**.
The dialog box closes and you return to the API permissions page.

11. Grant admin consent for your application.

What to do next

After you successfully register and set up your application, remain in the Microsoft Azure portal if you must enable your application to access Power BI service content and APIs.

Enable service principal authentication for Power BI read-only APIs

Grant your application access to Power BI service content and APIs by enabling service principal authentication for Power BI read-only APIs. Power BI service content and APIs help optimize your Microsoft 365 subscriptions, such as by downgrading subscriptions from Office 365 E5 to Office 365 E3.

Before you begin

Microsoft Entra ID Role required: global administrator

Power BI Role required: Power platform administrator

Note: This configuration enables the ServiceNow Software Asset Management application to get the usage information (Last usage time) for all Power BI Pro deployments across the Web and Desktop. The Software Asset Management application pulls the last activity date for Power BI deployments that are part of Microsoft 365 subscriptions.

About this task

Service principal is an authentication method that enables your application to access secure Microsoft Entra ID resources, such as Power BI service content and APIs.

Procedure

1. Create a security group for service principal authentication.
Security groups enable you to manage which users, devices, groups, and service principals can access shared resources. If you want to use an existing security group for service principal authentication, skip to step 2.

   a. On the page header of the Microsoft Azure portal, use the search bar to search for and select the **Microsoft Entra ID** service.
   The Overview page for the Microsoft Entra ID service opens.

   b. From the side navigation menu of the Microsoft Entra ID service, navigate to **Manage** > **Groups**.
   The **Groups** > **All groups** page opens.

   c. On the All groups page, select **New group**.

   d. On the form, fill in the fields.

New Group form

Field	Description
Group type	Group type.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Set this field to **Security**.
Group name	Name of the group.
Group email address	Email address that is shared between all group members.
Group description	Description of the group.
Membership type	Method in which members can be added to or removed from the group. Set this field to **Assigned**.

e. Select **Create**.

The security group is created and then you're redirected to the Overview page for the new group.

2. Add the application that you created in Register a Microsoft Entra ID application as a member of your security group.

a. If you didn't create a security group in step 1 and are using an existing security group instead, open your existing security group.
If you created a security group in step 1, skip to step b.

i. On the page header of the Microsoft Azure portal, use the search bar to search for and select the **Microsoft Entra ID** service.

The Overview page for the Microsoft Entra ID service opens.

ii. From the side navigation menu of the Microsoft Entra ID service, navigate to **Manage** > **Groups**.

The **Groups** > **All groups** page opens.

iii. From the list of available groups, locate and select your existing security group.

The Overview page for the security group opens.

b. From the side navigation menu of your security group, navigate to **Manage** > **Members**.
The Members page opens.

c. On the Members page, select **Add members**.
The Add members dialog box opens.

d. In the dialog box, search for and select the application that you created in Register a Microsoft Entra ID application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: The application must not have any Power BI admin permissions set from the Microsoft Azure portal. You can verify your application permissions using the following steps:

i. Log in to the Microsoft Azure portal using either your global administrator, application administrator, or cloud application administrator credentials.

ii. On the page header of the Microsoft Azure portal, use the search bar to search for and select the **Microsoft Entra ID** service.

The Overview page for the Microsoft Entra ID service opens.

iii. From the side navigation menu of the Microsoft Entra ID service, navigate to **Manage** > **Enterprise applications**.

The Enterprise applications page opens.

iv. From the list of available enterprise applications, locate and select your application.

v. Select **Permissions**.

vi. Verify that no Power BI admin-consent-required permissions are set on the application.

e. Select **Select**.
The application is added as a member of your security group.

3. Enable your security group to access read-only Power BI admin APIs.

a. In a new tab or web browser, open Power BI.

b. Log in using either your global administrator or Power BI administrator credentials.
The Power BI portal opens.

c. On the page header of the Power BI portal, select the Settings icon and then select **Admin portal**.
The Power BI Admin portal opens.

d. From the side navigation menu of the Admin portal, select **Tenant settings**.

e. In the Admin API settings section, expand the **Allow service principals to use read-only Power BI admin APIs** setting.

f. Select the toggle button to enable the setting.

g. When prompted, select the option to apply the setting to **Specific security groups**.

h. In the corresponding text box, enter the name of your security group.

i. Select **Apply**.

After you enable this setting through the Power BI Admin portal, any application permissions that you set from the Microsoft Azure portal are no longer effective. All application permissions must subsequently be set and managed through the Power BI Admin portal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure updates on Microsoft 365 Admin Center

Avoid anonymous user information in Microsoft 365 reports on activity to be imported to ServiceNow.

Before you begin
Role required: admin

Procedure

1. Log in to Microsoft 365 admin center by using your admin credentials.
2. Navigate to **Settings** > **Services** > **Org settings** > **Reports**.
3. Deselect the **Display concealed user, group, and site names in all reports** check box.
   For more information about the Microsoft 365 reports showing anonymous user information, see Microsoft 365 reports show anonymous user names instead of actual user names.

Create a Microsoft 365 integration profile

Create an integration profile to track software subscriptions and optimize stale licenses for the Microsoft 365 service.

Before you begin
ServiceNow Role required: sam_integrator

To integrate with Microsoft 365, activate the following plugins:

- Software Asset Management Professional for Microsoft (com.snc.samp.microsoft) plugin
- Software Asset Management - SaaS License Management (sn_sam_saas_int) plugin from the ServiceNow Store

  For more information, see Request SaaS License Management.

About this task
If you're using Software Asset Workspace, the option to create the direct integration profile in Core UI is inactive.

Procedure

1. From a web browser, open your ServiceNow instance.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**
Software Asset Workspace	a. Navigate to **Workspaces** > **Software Asset Workspace** > **License operations**. b. Under **User subscription**, select **Direct integration profiles**.

2. Select **New**.
3. Select **Microsoft 365 Integration Profile**.
4. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `Microsoft 365 integration for <your-company>`.
Client Id	Client ID of the application that you registered in the Microsoft Azure portal. Enter the application (client) ID that you copied in Register a Microsoft Entra ID application.
Client secret	Client secret of the application that you registered in the Microsoft Azure portal. Enter the client secret that you copied in Register a Microsoft Entra ID application.
Tenant name or Id	Globally unique identifier (GUID) of the application that you registered in the Microsoft Azure portal. Enter the directory (tenant) ID that you copied in Register a Microsoft Entra ID application. **Warning:** When entering the directory (tenant) ID, don't add any additional extensions to the ID. Enter the ID exactly as it was copied in Register a Microsoft Entra ID application.
REST message	Message that enables you to send requests to a REST web service endpoint.
Profile type	Type of integration profile. This field is automatically set to **Microsoft 365**.
Permission type	The type of permission for the integration profile to access data correctly and securely. Values include: ○ **Application**: Permissions that enable the application to access any data without a signed-in user. ○ **Delegated**: Permissions that enable the application to act in place of a signed-in user.

5. In the Process configuration section, view the required user roles or API permissions to minimize security risks and optimize SaaS licenses.

   Note: For more information about the required roles and scopes, see Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The **Download subscriptions** check box is selected by default and you can't clear it.
- The **Download Activity** check box is selected by default. If you clear it, activity data for this integration profile isn't pulled.
- The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

6. Select **Submit**.
7. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
   If the connection is successfully validated, the integration profile downloads subscriptions and activity data.

   Note: If the **Download Activity** field is selected without configuring the optional Power BI settings, the Validate connection feature issues the following warning message: "All required APIs are validated successfully, but the optional Power BI API validation has failed."

8. **Optional:** Check the status of the user subscription job by navigating to **Software Asset** > **Administration** > **Job Results**.

What to do next

View all automatically generated software models for Microsoft 365 by navigating to **Integration - Microsoft 365** > **Software Models**. A software model is a profile of the software that you have purchased, including information about the publisher, version, and discovery map. Software models record publisher information and create a profile.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select a Microsoft 365 integration profile to view the following related lists:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

When you create an integration profile, a reclamation rule is automatically created for the software. It's important that you review the reclamation rule to ensure that it meets your specifications. You can view all automatically generated reclamation rules for Office 365 by navigating to **Software Asset** > **Administration** > **Reclamation Rules**. Reclamation rules are applied based on the Microsoft System Center Configuration Management (SCCM) usage data that is pulled through the Microsoft SCCM usage integration. For more information on these reclamation rules, see Create a reclamation rule to import Microsoft SCCM usage data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: ServiceNow automatically creates one default reclamation rule for Office 365. You can also update the Last activity threshold field under the Subscription Usage Condition tab.

Related topics

Review a software reclamation rule

Reclamation rules for Microsoft 365 integration

Software Asset Management software suites

Determine and verify Microsoft 365 subscription information in your ServiceNow instance

Determine the exact software subscription information to be pulled from the Microsoft 365 admin center and verify if complete subscription information is pulled accurately to ServiceNow.

Before you begin

Role required: sam_admin

Procedure

1. Filter with the Microsoft 365 integration profile you created to determine the exact software subscription information to be pulled from Microsoft 365 admin center to ServiceNow. This subscription includes all subscriptions available on the Microsoft 365 admin center.
2. Verify with the Microsoft 365 admin if complete subscription information is pulled accurately to ServiceNow.

   Note:

   Software Asset Management pulls the last activity date for Microsoft 365 products using a combination of Microsoft System Center Configuration Manager (SCCM) integration and Microsoft 365 integration.

3. If your Microsoft 365 subscription data isn't getting pulled into Software Asset Management, verify your integration setup:

   a. On the Integration Profile form, open the REST message record by selecting the Preview icon next to the **REST message** field.

   b. Select **Open Record** in the record preview.

   c. On the Rest Message form, select the **Get OAuth Token** related link.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

   d. On the OAuth flow verification dialog box, view the status of the OAuth flow to determine whether your integration is set up correctly.

   - If the `OAuth token flow completed successfully` message appears, your integration is set up correctly.
   - If the `OAuth flow failed` message appears, your integration isn't set up correctly. Use the information in this message to identify the errors in your integration setup.

4. If your Power BI usage isn't getting pulled into Software Asset Management, verify the status of your Power BI API connection.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the Integration Profile form, select and hold (or right-click) the form header.

b. Select **Show XML**.

> **Note:** If the **Show XML** option isn't visible in the default view, you can customize the view. Select and hold (or right-click) the form header and then select **View** > **custom integration**.

c. Under **<xml>** > **<samp_sw_subscription_profile>** > **<custom_properties>**, view the *powerBIAPIStatus* property to determine the status of your Power BI API connection.
   - If the *powerBIAPIStatus* property is set to **success**, the Power BI API connection was successful.
   - If the *powerBIAPIStatus* property is set to **failed**, the Power BI API connection wasn't successful. Verify that you've followed all the integration setup steps correctly. You can also check your logs for more information about any errors in your integration setup.

5. **Optional:** If the **User** field in the Software Subscription [samp_sw_subscription] table is empty, you can map the field with an associated user.

   (Optional) For more information, see Associate a user with subscription records.

Upload the Microsoft 365 Copilot, Visio Online, Planner, and Project usage reports to your ServiceNow instance

Monitor the usage activity data for Microsoft 365 Copilot, Visio Online, Planner and Project to identify reclamation candidates based on low usage.

Before you begin

Role required:

- Access the Microsoft 365 admin center: admin
- Add reports to the ServiceNow instance: sam_admin

About this task

You can export the usage reports for Microsoft Copilot, Visio Online, Planner, and Project from the Microsoft 365 admin center and add the reports to your ServiceNow instance. These usage activity reports help in license optimization by identifying potential reclamation candidates based on low usage.

Procedure

1. Log in to Microsoft 365 admin center using your global administrator credentials.
2. Navigate to **Reports** > **Usage**.
3. Download the usage reports.
   - Select **Copilot for Microsoft 365** and download the CSV file by selecting **Export**.
   - Select **Project** and download the CSV file by selecting **Export**.
   - Select **Planner** and download the CSV file by selecting **Export**.
   - Select **Visio** and download the CSV file by selecting **Export**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You must not change the names of the downloaded files. You must upload the files as is to your ServiceNow instance.

You must upload the CSV files to your ServiceNow instance within 7 days for correctly identifying potential reclamation candidates.

4. From the navigation menu, select **Identity**.
   The Azure portal for the current tenant opens.
5. On the Overview page, copy the value in the **Tenant ID** field and save it for later use.
6. From a web browser, open your ServiceNow instance.

Interface	Action
Core UI	Open the Integration Profiles [samp_sw_subscription_profile] table. Integration profiles open in the list view.
Software Asset Workspace	**a.** Navigate to **Workspaces** > **Software Asset Workspace** > **License operations**. **b.** Under **User subscription**, select **Direct integration profiles**.

7. Apply filters to open integration profiles for a specific Tenant id for which you want to upload the usage reports.

Interface	Action
Core UI	**a.** Select the Show/hide filter icon on the table header. **b.** Set the condition **[Tenant name or id] [is] [Tenant ID copied in step 5] AND [Profile type] [is] [Microsoft 365]**. **c.** Select **Run**.
Software Asset Workspace	**a.** Select the filter icon and then select **Advanced view**. **b.** Set the condition **[Tenant name or id] [is] [Tenant ID copied in step 5]**. **c.** Add a filter condition by selecting **+ New condition set**. **d.** Set the condition **[Profile type] [is] [Microsoft 365]**. **e.** Select **Update**.

8. Add the usage reports to an integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Core UI	**a.** Select an integration profile. **b.** Select the Manage Attachments icon on the form header. **c.** In the Attachments dialog box, select **Choose file**. **d.** Select all the CSV files that you down loaded in step 3 to add them to the integra tion profile. **e.** Close the dialog box to return to the Integra tion Profile form. **f.** The uploaded CSV files appear next to the Manage Attachments icon.
Software Asset Workspace	**a.** Select an integration profile. **b.** Select the Attachment icon from the sidebar of the integration profile. **c.** In the Attachments window, select **Select file**. **d.** Select all the CSV files that you down loaded in step 3 to add them to the integra tion profile. **e.** The uploaded CSV files appear in the At tachment window.

What to do next

The usage activity reports that you uploaded can be monitored for license optimization and generation of reclamation candidates. For details, see Evaluating software usage activity for Microsoft 365 subscriptions.

Evaluating software usage activity for Microsoft 365 subscriptions

Evaluating software usage activity helps you discover active, inactive, and unassigned subscriptions among all subscriptions found on the Microsoft 365 portal.

Software usage activity for license optimization

Software usage activity refers to how software products are being used. By tracking this activity, you can monitor license usage and optimize your existing software subscriptions.

The following table lists the sources for collecting the software usage activity, the associated platform support, and the supported Microsoft 365 products.

Sources of software usage activity collection	Platform support	Supported Microsoft Office 365 products
Microsoft Graph APIs	Desktop, Web, Mobile	Outlook, Word, PowerPoint, Excel, OneNote, Teams,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sources of software usage activity collection	Platform support	Supported Microsoft Office 365 products
		Exchange Online, SharePoint Online, Power BI
Microsoft SCCM or ACC-V	Desktop	Microsoft Office 365 apps for Enterprise
Jamf for macOS devices	Desktop	Microsoft Office 365 apps for Enterprise
Manual upload of the usage reports on the ServiceNow instance from the Microsoft Office 365 admin center	Desktop, Web, Mobile	Microsoft 365 Copilot, Visio Online, Planner, and Project

Note: You can download the usage for Microsoft 365 Copilot, Visio Online, and Project Online from the Microsoft Office 365 admin center. For details, see Upload the Microsoft 365 Copilot, Visio Online, Planner, and Project usage reports to your ServiceNow instance.

After completing the Microsoft 365 integration, you can view the usage activity information using any of the following tables:

- Software Usages [samp_sw_usage]

  View the usage data for individual software products within the subscription in the Software Usages table. This table stores total usage and last activity retrieved from Microsoft APIs and other discovery solutions such as SCCM, Jamf, and ACC-V. For more details on software usage fields and their descriptions, see View or create software usage.

- Microsoft 365 Apps Usage Reports [samp_m365_apps_usage_report]

  View the last activity date for the Microsoft 365 products in the Microsoft 365 Apps Usage Reports table for each user. This table stores usage data for Microsoft 365 products in True or False retrieved from Microsoft APIs only. The last activity date helps you determine reclamation candidates more accurately for Microsoft 365 products, including Microsoft Outlook, Microsoft Word, Excel Microsoft PowerPoint, and OneNote. For more details on Microsoft 365 apps usage fields and their descriptions, see Microsoft 365 Apps Usage Reports.

These usage tables include the date when the software was last used and the type of the activities performed on the Desktop, Web, Mobile, or cumulative across platforms. The last activity data helps you select an optimized plan for individual products within your Microsoft 365 subscriptions. For related usage, the#*SAM - Collect Microsoft 365 Usage* scheduled job collects the usage data daily.

Based on the software usage activity, Software Asset Management generates optimization recommendations for your software subscriptions.

License optimization for Microsoft subscriptions

Software usage activity helps you with license optimization by discovering reclamation candidates from both the individual Microsoft products and the Microsoft 365 suite subscriptions. For more information, see Publisher optimizations for Microsoft. The#*SAM - Collect Microsoft 365 Usage* scheduled job collects the usage data daily and the#*SAM - Create New Reclamation Candidates for Office 365 Integration* #generates the removal candidates weekly for low usage, downgrade, consolidated, and overlapping subscriptions. You can determine the reclamation candidates using both APIs and discovery solutions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Overlapping subscriptions**

  Overlapping Microsoft 365 integration subscriptions occur when a user or organization has several active subscriptions that provide the same or similar services at the same time. For example, both Microsoft 365 E3 and Office 365 E3 subscriptions exist, leading to unnecessary duplicate access to Office applications and additional services already included in Microsoft 365 E3. Software Asset Management recommends reclaiming the Office 365 E3 subscriptions and using the Microsoft 365 E3 subscriptions instead.

- **Low usage subscriptions**

  Low usage Microsoft 365 or Microsoft Office 365 subscriptions are the subscriptions where the assigned licenses or services aren't being fully used.

  - Individual subscriptions such as Microsoft Teams, Microsoft SharePoint, or other single services.
  - Subscription suites including Microsoft 365 and Microsoft Office 365.

  Software Asset Management recommends reclaiming the low usage subscriptions.

- **Downgrade subscriptions**

  Downgrading Microsoft 365 or Microsoft Office 365 subscriptions means to switch from a higher-tier plan to a lower-tier plan. This approach usually involves moving from a plan with more features and services to one with fewer features and services, often at a reduced cost. The following table lists the downgrade subscriptions and conditions that result in downgrade recommendations.

Conditions for downgrade subscriptions

Condition	Downgrade subscriptions
No Power BI usage	○ Microsoft 365 Enterprise E5 to Microsoft 365 Enterprise E3 ○ Microsoft 365 G5 USGOV GCCHIGH to Microsoft 365 E3 USGOV GCCHIGH ○ Microsoft 365 G5 for Government to Microsoft 365 G3 GCC ○ Microsoft 365 A5 for Students to Microsoft 365 A3 for Students ○ Microsoft 365 A5 for Faculty to Microsoft 365 A3 for Faculty
No desktop usage	○ Microsoft 365 E3 to Microsoft 365 F3 ○ Microsoft Office 365 G3 GCC to Microsoft Office 365 G1 for Government ○ Microsoft 365 Enterprise E3 to Microsoft 365 Enterprise E1 ○ Microsoft 365 A3 for Students to Microsoft 365 A1 for Students ○ Microsoft 365 A3 for Faculty to Microsoft 365 A1 for Faculty

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Condition	Downgrade subscriptions
	Note: For Microsoft 365 E3 to Microsoft 365 F3 downgrade, the user's mailbox and OneDrive size is also checked after checking the desktop usage.
User is a Shared Email Box	○ Microsoft 365 Enterprise E3 to Microsoft Exchange Online Plan 2 ○ Microsoft 365 Enterprise E5 to Microsoft Exchange Online Plan 2 ○ Microsoft Office 365 Enterprise E3 to Microsoft Exchange Online Plan 2 ○ Microsoft Office 365 Enterprise E5 to Microsoft Exchange Online Plan 2 **Note:** When the user is a shared email box, you can select the type of user as **Shared Email Box** in the **Non-person Account** field in the Discovered Users form.
Microsoft Exchange Online (mailbox) and Microsoft OneDrive size	Microsoft 365 E3 to Microsoft 365 F3 If a user's mailbox size and OneDrive size is less than two gigabytes (GB), a downgrade recommendation is generated. The usage is retrieved from the Software storage usage [saas_sw_storage_usage] table. For more information, see Software storage usage fields.

Additionally, you can view the Microsoft 365 and Office 365 downgrade candidates, including details about the source edition and the target edition in the Subscription downgrade configuration [saas_downgrade_configuration] table.

You can view the conditions for downgrading the Microsoft 365 and Office 365 subscriptions in the Subscription downgrade configuration condition [saas_downgrade_config_condition] table.

Note: You can also determine usage for Microsoft Access and Publisher from additional discovery solutions, such as Microsoft SCCM or ACC-V for E3 to E1 optimization. Here, the frequency of downgrade candidate generation from E3 to E1 would be monthly instead of weekly.

- **Consolidated subscriptions**

  Consolidating Microsoft 365 integration subscriptions means merging multiple separate subscriptions into one unified subscription. This approach brings all licenses and services under a single account which helps in saving cost, easier track usage, and license assignments. For example, if Office 365 Enterprise E5, Windows, and EMS subscriptions exist, Software Asset Management recommends using a single license such as Microsoft 365 Enterprise E5 to cover these multiple products at a lower cost.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Additionally, the subscription assignment date that is automatically populated from the Microsoft 365 portal helps in generating the reclamation candidates for individual subscriptions. Using the subscription assignment date instead of the record creation date on the ServiceNow AI Platform helps to create correct reclamation candidates based on the actual use from the Microsoft 365 portal.

Related topics

- Integrating with Microsoft 365
- Publisher optimizations for Microsoft
- Reclamation rules for Microsoft 365 integration
- Scheduled jobs for Microsoft 365

Evaluate Microsoft 365 compliance and optimization results

Evaluate Microsoft 365 compliance and optimization results to find actual and potential cost savings and recommended licensing optimizations.

Before you begin

Role required: sam_admin or sam_user

The discovery of Microsoft 365 must be complete to evaluate the software compliance. For more information about using Discovery and Microsoft SCCM together, see Discovery and SCCM together.

The usage of Microsoft 365 plans must be available from both Microsoft certified APIs and Microsoft SCCM to evaluate the software optimization.

Procedure

1. Navigate to **Software Asset Workspace** > **License operations**.
2. In the left pane, select **Licensing** > **Software entitlements**.
3. Select **New**.
4. Create entitlements for Microsoft 365 by selecting the correct Publisher Part Number (PPN) to verify compliance.
   For more information about creating entitlements, see Create entitlements in workspace.

   Note: Ensure that the License metric value is User Subscription.

5. Navigate to **License usage** in the left pane.
6. Select the **Reconciliation** tab.
7. Select **Run reconciliation**.
8. View compliance analysis results in Office 365 & Adobe Cloud dashboard in Software Asset Management classic and SaaS overview dashboard in workspace.
   For more information about running software reconciliation, see Run software reconciliation in Software Asset Management classic and Run Basic Software Asset Management software reconciliation in classic.
9. View all optimized plans for Microsoft 365 subscription on the Optimization and savings dashboard in workspace.

Update REST and OAuth endpoints for Microsoft Office 365 Government plans

Change the endpoints of the REST message and OAuth application on your ServiceNow subscription profile so that you can use your subscriptions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sam_admin

About this task
The ServiceNow AI Platform® supports Microsoft Office 365 Government plans, which provide all the features and capabilities of Microsoft 365 services in a segmented government cloud community that enables organizations to meet U.S. compliance and security standards.

For more information on Microsoft Office 365 Government plans, see Office 365 Government.

Important: The Software Asset Management application supports tracking last activity for license compliance, subscription management, and optimization recommendations for Microsoft products such as Exchange Online, Teams, Power BI, OneDrive, and so on. For more details, see Evaluating software usage activity for Microsoft 365 subscriptions.

The detailed usage metrics for these Microsoft products (except Power BI) are only available through specific report APIs that aren't supported in government-regulated environments. For further details, refer to the Microsoft national cloud deployments documentation.

Procedure
1. From your ServiceNow instance, navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**.
2. Select the Microsoft 365 integration profile that you want to update.
3. On the Integration Profile record, select the Preview this record icon next to the **REST message** field.
4. On the record preview, select **Open Record**.
   The REST Message record opens.
5. Update the REST message endpoints on your Microsoft 365 integration profile.

   REST message endpoints enable you to retrieve usage data from your Microsoft 365 applications and services.

   a. In the **HTTP Methods** related list, update the REST message endpoints based on your needs.

      Microsoft provides various endpoints for Microsoft Office 365 Government plans. For more information on the available endpoints, see Office 365 U.S. Government GCC High endpoints.

      Important: You must change the `.com` to `.us` in the URL of each endpoint. For example, you must change `https://graph.microsoft.com/v1.0/reports` to `https://graph.microsoft.us/v1.0/reports`.

   b. Select **Save**.

   c. Update the OAuth entity scope for the **GET PowerBI Usage** endpoint.
      The OAuth entity scope specifies the level of access that users have to your protected resources.

      i. Select the **GET PowerBI Usage** endpoint.

         The HTTP Method record opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ii. In the Authentication section of the HTTP Method record, select the Preview this record icon next to the **OAuth profile** field.

iii. On the record preview, select **Open Record**.

The OAuth Entity Profile record opens.

iv. In the OAuth Entity Profile Scopes list, update the **OAuth scope** field of the **PowerBIPermissions** OAuth entity scope with the backend API URL that you're using for Microsoft Power BI.

Note: Microsoft supports various backend API URLs for Power BI. For more information on the available URLs, see Power BI for US Government.

v. Select **Update**.

The OAuth Entity Profile record closes and you automatically return to the REST Message record.

6. Update the OAuth application endpoint on your Microsoft 365 integration profile.
The OAuth application endpoint enables your ServiceNow instance to access your Microsoft 365 subscription data.

a. In the Authentication section of the REST Message record, select the Preview this record icon next to the **OAuth profile** field.

b. On the record preview, select **Open Record**.
The OAuth Entity Profile record opens.

c. In the OAuth Entity Profile Scopes list, change the `.com` to `.us` in the URL that is listed in the **OAuth scope** field of the **Permissions** OAuth entity scope.

d. Select the Preview this record icon next to the **OAuth provider** field.

e. On the record preview, select **Open Record**.
The Application Registries record opens.

f. Select the Edit URL icon next to the **Token URL** field.

g. In the URL, change the `.com` to `.us`.
For example, change `https://login.microsoftonline.com` to `https://login.microsoftonline.us`.

h. Select the Lock URL icon.

i. Select **Update**.

What to do next

Revalidate the connection and credential details of this integration. For more information, see Create a Microsoft 365 integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Creating Microsoft 365 From SA and Add-on entitlements

You can create entitlements to track and manage the From SA and Add-on licensing terms for your Microsoft 365 subscription software products and services.

For more information on Microsoft 365 From SA and Add-on USLs, see Supported Microsoft 365 license types.

Create Microsoft 365 From SA and Add-on entitlements in Software Asset Management classic

Create a Microsoft 365 From SA or Add-on entitlement in the Software Asset Management classic application so that you can track and manage the From SA or Add-on licensing terms for your Microsoft 365 subscription software products and services.

Before you begin

Role required: sam_user or sam_admin

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **Software Entitlement**.
2. Select **New**.
3. On the form, fill in the fields.
   For a detailed description of each field, see Software entitlement fields.

   Important: To create a Microsoft 365 From SA or Add-on entitlement, set the **Software model** field to a Microsoft 365 software model and then set the **License type** field to either **From SA** or **Add-on**.

   Tip: If you're using both Full and Add-on USLs for the same Microsoft 365 subscription software product or service, associate the corresponding entitlements with different software models to avoid licensing conflicts.

4. Select **Save**.
5. After the form reloads, select **Publish**.
   The State of the entitlement changes from Build to In use, and the entitlement is ready to be used in the reconciliation process.
6. Assign the From SA or Add-on entitlement to the entitlement for the corresponding Microsoft software product or service that you want to transition from or add on to.

   Note: You can assign a From SA or Add-on entitlement to multiple corresponding Microsoft entitlements.

   Note: By default, the software model for your From SA or Add-on entitlement includes the corresponding Microsoft software product or service as a suite component. If the product or service isn't already included as a suite component, you can include it manually. See Create software models in Software Asset Management classic for detailed instructions.

   a. Select the **Related Entitlements** tab.

   b. In the Related Entitlement column of the Related Entitlements list, double-click **Insert a new row**.

   c. When prompted, search for and select the corresponding Microsoft entitlement that you want to assign the From SA or Add-on entitlement to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: This entitlement must use either the Per User or Per Device license metric. In addition, it can't already be assigned with another entitlement or have any active allocations.

Note: If a corresponding Microsoft entitlement isn't available for the given From SA or Add-on entitlement, you can create one.

d. Select the Save (Enter) icon .

e. Double-click the corresponding field in the **Active rights** column of the Related Entitlements list.

f. When prompted, enter the number of From SA or Add-on rights that you want to grant to the corresponding Microsoft entitlement.

Important:

- For From SA rights, you must enter the total number of rights that you purchased for the corresponding Microsoft entitlement. For example, if you purchased 100 rights for the corresponding Microsoft entitlement, you must grant 100 From SA rights to that entitlement.
- For Add-on rights, you can enter any number of rights equal to or less than the total number of rights that you purchased for the given Add-on entitlement.

g. Select the Save (Enter) icon .

h. Select **Save** on the Software Entitlement form header.

The From SA or Add-on entitlement is assigned to the specified Microsoft entitlement.

Related topics

Software entitlement fields

Create Microsoft 365 From SA and Add-on entitlements in the Software Asset Workspace

Create a Microsoft 365 From SA or Add-on entitlement in the Software Asset Workspace so that you can track and manage the From SA or Add-on licensing terms for your Microsoft 365 subscription software products and services.

Before you begin

Role required: sam_user or sam_admin

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace**.
2. Create a software entitlement.
   - From the Software asset overview, select **Create entitlement**.
   - From the License operations view, navigate to **Licensing** > **Software entitlements** and then select **Create entitlement**.
3. In the Create new entitlement dialog box, select the option to **Fill out the details in a standard form** and then select **Next**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The dialog box closes and you're automatically redirected to the Create New Software Entitlement form.

4. On the form, fill in the fields.
   For a detailed description of each field, see Software entitlement fields.

   Important: To create a Microsoft 365 From SA or Add-on entitlement, set the **Software model** field to a Microsoft 365 software model and then set the **License type** field to either **From SA** or **Add-on**.

   Tip: If you're using both Full and Add-on USLs for the same Microsoft 365 subscription software product or service, associate the corresponding entitlements with different software models to avoid licensing conflicts.

5. Select **Save**.
   The form closes and you're automatically redirected to the new software entitlement record.
6. On the software entitlement record, select **Publish**.
   The State of the entitlement changes from Build to In use, and the entitlement is ready to be used in the reconciliation process.
7. Assign the From SA or Add-on entitlement to the entitlement for the corresponding Microsoft software product or service that you want to transition from or add on to.

   Note: You can assign a From SA or Add-on entitlement to multiple corresponding Microsoft entitlements.

   Note: By default, the software model for your From SA or Add-on entitlement includes the corresponding Microsoft software product or service as a suite component. If the product or service isn't already included as a suite component, you can include it manually. See Create a software model in the Software Asset Workspace for detailed instructions.

   a. On the **Related Entitlements** tab of the software entitlement record, select **New**.

   b. On the form, fill in the fields.

Create New Related Entitlement

Field	Description
Domain	Domain that the corresponding Microsoft entitlement applies to. The default value is **global**.
Software entitlement	From SA or Add-on entitlement that you want to assign to the corresponding Microsoft entitlement. This field populates automatically.
Related Entitlement	Corresponding Microsoft entitlement that you want to assign the From SA or Add-on entitlement to. **Important:** This entitlement must use either the Per User or Per Device license metric. In addition, it can't already be assigned with another entitlement or have any active allocations. **Note:** If a corresponding Microsoft entitlement isn't available for the given From SA or Add-on entitlement, you can create one. See Create entitlements in workspace for detailed instructions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Active rights	Number of From SA or Add-on rights that you want to grant to the corresponding Microsoft entitlement. **Important:** ▪ For From SA rights, you must enter the total number of rights that you purchased for the corresponding Microsoft entitlement. For example, if you purchased 100 rights for the corresponding Microsoft entitlement, you must grant 100 From SA rights to that entitlement. ▪ For Add-on rights, you can enter any number of rights equal to or less than the total number of rights that you purchased for the given Add-on entitlement.

c. Select **Save**.

The From SA or Add-on entitlement is assigned to the specified Microsoft entitlement.

Related topics

Software entitlement fields

Creating reserve entitlements for Microsoft online services

You can create reserve entitlements for Microsoft online services to add licenses to your existing Microsoft 365 subscriptions. You can pay for the new licenses during your true-up process.

Overview of license reservation

A license reservation enables you to place a license reservation order for migrating on-premises assets to the cloud without requiring a purchase order. Only Microsoft online services are eligible for license reservation orders.

Note: You can create a reserve entitlement only from an existing Microsoft entitlement. The existing entitlement must meet the following criteria:

- **License type** is Subscription.
- **Metric group** is Microsoft.
- **License Metric** is User Subscription.
- **Publisher** is Microsoft for the product on the software model.
- **Subscription software** is selected for the product on the software model.

Create a reserve entitlement for Microsoft online services in Software Asset Management classic

Create a reserve entitlement for all Microsoft online services in the Software Asset Management classic application so that you can add licenses to an existing Microsoft 365 subscription.

Before you begin
Role required: sam_user or sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **Software Entitlement** and then select a Microsoft Office 365 entitlement.
2. Select the **Create Reserve Entitlement** related link.
3. On the form, fill in the fields.

Field	Description
Start date	Start date for the new licenses.
End date	The earliest anniversary of the source entitlement end date. This field is calculated automatically.
Purchased rights	Number of new licenses.
Monthly unit cost	The per-license monthly cost of your Microsoft 365 subscription, calculated by dividing the unit cost of the source entitlement by its duration in months. This value reflects your actual Microsoft 365 agreement pricing and is used to calculate true-up costs and optimization savings such as license reclamation.
Software model	Software model for the existing entitlement. This field populates automatically.
Source entitlement	Existing entitlement used to create the reserve entitlement. This field populates automatically.

4. Select **Submit**.
   The new reserve entitlement is added to the **Reserve Entitlements** related list in the source entitlement. The state of the reserve entitlement is In use and the **Reserve entitlement** check box is selected.

What to do next

Run a reconciliation to include the new reserve entitlement in the true-up cost calculation. Navigate to **Software Asset** > **Office 365 & Adobe Cloud** to view the Office 365 & Adobe Cloud dashboard. The cost of the reserve entitlement is included in True-up Cost and is not included in Current Subscription Spend.

When you pass the end date of the reserve entitlement, the SAM - Subscription Maintenance scheduled job creates a new entitlement to replace it.

Note: The new entitlement is not added to the Reserve Entitlements related list in the original source entitlement.

Entitlement record

Field	Value
Reserve entitlement	Option that indicates whether the new entitlement is a reserve entitlement. This option is not selected.
Start date	Date that the new entitlement is created.
End date	End date of the original source entitlement.
Source entitlement	Original source entitlement.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Entitlement record (continued)

Field	Value
Purchased rights	Same number of purchased rights as the reserve entitlement.
Active rights	Same number of active rights as the reserve entitlement.
Allocations available	Same number of allocations available as the reserve entitlement.
State	State of the entitlement. This field is set to **In use**.

The state of the reserve entitlement updates to **Retired**. On the Office 365 & Adobe Cloud dashboard, the cost of the retired reserve entitlement is removed from the True-up Cost. The cost of the new entitlement is included in Current Subscription Spend.

Create a reserve entitlement for Microsoft online services in the Software Asset Workspace

Create a reserve entitlement for Microsoft online services in the Software Asset Workspace so that you can add licenses to an existing Microsoft 365 subscription.

Before you begin

To create reserve entitlements for Microsoft online services in the Software Asset Workspace, you must request and activate the Software Asset Workspace (sn_sam_workspace) store application. For details on requesting and activating the Software Asset Workspace (sn_sam_workspace) store application, see Request Software Asset Management.

Role required: sam_user or sam_admin

Procedure

1. From your ServiceNow instance, navigate to **Software Asset** > **Software Asset Workspace**. The Software Asset Workspace launches in a new tab.
2. From the left navigation menu of the Software Asset Workspace, select **License operations**. The License operations view opens.
3. From the left navigation menu of the License operations view, navigate to **Licensing** > **Software entitlements**.
4. From the list of available software entitlements, select a Microsoft Office 365 entitlement. The software entitlement details page opens in a new tab.
5. Select **Create Reserve Entitlement**.
6. On the form, fill in the fields.

Reserve Entitlement Record Producer form

Field	Description
Start date	Start date for the new licenses.
End date	The earliest anniversary of the source entitlement end date. This field is calculated automatically.
Purchased rights	Number of new licenses.
Monthly unit cost	The per-license monthly cost of your Microsoft 365 subscription, calculated by dividing the unit cost of the source entitlement by its duration in months.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	This value reflects your actual Microsoft 365 agreement pricing and is used to calculate true-up costs and optimization savings such as license reclamation.
Software model	Software model for the existing entitlement. This field populates automatically.
Source entitlement	Existing entitlement that is used to create the reserve entitlement. This field populates automatically.

7. Select **Submit**.
8. After your request is successfully submitted, select **Close**.
   The new reserve entitlement is added to the **Reserve Entitlements** related list in the source entitlement. The state of the reserve entitlement is In use and the **Reserve entitlement** check box is selected.

What to do next

Run a reconciliation to include the new reserve entitlement in the true-up cost calculation. View your reconciliation results in the Microsoft publisher overview. The cost of the reserve entitlement is included in the **True-up cost** report.

When you pass the end date of the reserve entitlement, the SAM - Subscription Maintenance scheduled job creates a new entitlement to replace it.

Note: The new entitlement isn't added to the **Reserve Entitlements** related list in the original source entitlement.

Entitlement record

Field	Value
Reserve entitlement	Option that indicates whether the new entitlement is a reserve entitlement. This option isn't selected.
Start date	The date that the new entitlement is created.
End date	End date of the original source entitlement.
Source entitlement	Original source entitlement.
Purchased rights	Same number of purchased rights as the reserve entitlement.
Active rights	Same number of active rights as the reserve entitlement.
Allocations available	The same number of allocations available as the reserve entitlement.
State	State of the entitlement. This field is set to **In use**.

The state of the reserve entitlement updates to **Retired**. On the Microsoft publisher overview, the cost of the retired reserve entitlement is removed from the **True-up cost** report. The cost of the new entitlement is included in the Current Subscription Spend.

Automated license removal for Microsoft 365

Software Asset Management optimizes Microsoft 365 subscription usage by identifying low usage and overlapping candidates, and then automatically removing the licenses from the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft 365 admin center. This proactive management helps you streamline costs and enhance the efficiency of low usage and overlapping licenses.

Eligible candidates

After a reclamation candidate is generated, the following low usage and overlapping candidates are considered eligible for automated removal:

- Low usage candidates with individual subscriptions such as Microsoft Teams, Microsoft SharePoint, or other single services.
- Low usage candidates with subscription suites including Microsoft 365 and Microsoft Office 365.

  Note: However, due to the varied usage across different products within these suites, users are notified, and the final removal requires approval from the SAM Manager. The **Notify User** check box is selected by default in the reclamation rule. But you can clear the check box to skip the approval process.

- Overlapping candidates with any subscription type.

Prerequisites

Before initiating the automatic removal of licenses from the Microsoft 365 admin center, confirm that the following prerequisites are met:

- The following spoke is set up and plugins are installed:
  - Microsoft Entra ID Spoke
  - Software Asset Management Professional (com.snc.samp)
  - Software Asset Management - SaaS License Management (sn_sam_saas_int)
- Microsoft Entra ID is configured with the following permissions to access and manage user and group information:
  - **User.Read.All**
  - **GroupMember.ReadWrite.All**
  - **LicenseAssignment.ReadWrite.All**

Scenarios

Software Asset Management removes the Microsoft 365 licenses from the Microsoft 365 admin center in the following scenarios:

- When a license is directly assigned to a user, the license is removed.
- When a license is directly assigned to a user and also through one or more groups, the user is removed from the group and the direct license assigned to the user is removed.

  Note: When multiple licenses are assigned to a user through a group, the user isn't removed from the group.#f a user in a group with multiple licenses shows low usage and is subsequently removed, they may lose access to other important licenses. You must contact your Microsoft 365 Admin to address this issue. For more information, see Manage licensing in Microsoft Entra ID.

- When a license is directly assigned to a user and also through multiple groups having the same and only one license, the user is removed from all the groups and the direct license assigned to the user is removed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: When multiple licenses are assigned to a user through different groups, the user isn't removed from any groups.

- When Software Asset Management removes the Microsoft 365 licenses from the Microsoft 365 admin center successfully, the reclamation workflow closes automatically.

Related topics

Evaluating software usage activity for Microsoft 365 subscriptions

Optimization and savings dashboard in workspace

Microsoft SQL Server licensing in container deployments

The Software Asset Management publisher pack for Microsoft supports licensing rules for Microsoft SQL Server products that are deployed across both on-premise and cloud environments using Docker containers.

Containers are executable software packages that bundle all the code and dependencies that are required for deploying and running a specific application. With a container, you can deploy and run the same application uniformly across any computing environment, such as a desktop computer or the cloud, without having to reconfigure the application. Each container also virtualizes an operating system (OS) so that you can quickly and easily deploy multiple isolated applications within the same computing environment.

The Software Asset Management application works in conjunction with the ServiceNow® Discovery application to identify the following information in both on-premise and cloud environments:

- The Docker containers through which your Microsoft SQL Server products are deployed.
- The corresponding Kubernetes clusters that enable each container to run.
- The OS of the underlying physical server that the container is running on.
- The Microsoft SQL Server version and edition that is deployed through each container.
- The number of virtual processor cores that are assigned to each container.

The Software Asset Management application uses the resulting data to create corresponding software installation records for each of your discovered containers. You can then reconcile these container-based software installations to track and optimize the license compliance of the Microsoft SQL Server products that are deployed through each container.

For more visibility into the Microsoft SQL Server products that are deployed through your Docker containers, view the Licensable Software Products Deployed on Containers report.

For more information on Docker discovery, see Docker virtualization. For more information on Kubernetes discovery, see Kubernetes discovery.

Supported licensing models

The Microsoft publisher pack supports the following licensing models for Microsoft SQL Server products that are deployed through containers:

Note: For more information on each licensing model, refer to Supported Microsoft license types.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Supported Microsoft SQL Server licensing models in container deployments

Licensing Model	Description
Per core	You must license each container as a standalone device. Licensing is based on the number of virtual CPUs (vCPUs) that are discovered on each container, with a minimum of four per core licenses per container.
Server/ CAL	You must license each container using a server (per instance or per server) license. You must also license each user or device that is accessing the underlying physical server running these containers using a user or device CAL license. Server licenses enable you to license container-based software installations on your physical servers. To license only a certain number of installations on a physical server, use a server (per instance) license. To license all installations on a physical server, use a server (per server) license. CAL licenses are client access licenses that grant a set number of users or devices access to the underlying physical server on which your containers are running. • To grant a set number of users access to a physical server, regardless of how many devices those users are accessing the server through, use a user CAL license. • To grant a set number of devices access to a physical server, regardless of how many users are accessing the server through those devices, use a device CAL license.

Licensable Software Products Deployed on Containers report

You can use the Licensable Software Products Deployed on Containers report to gain visibility into the software products that are deployed across both on-premise and cloud environments using Docker containers.

Note: To view this report, activate the Software Asset Management Professional plugin (com.snc.samp) and the Discovery and Service Mapping Patterns application.

The Licensable Software Products Deployed on Containers report is available only in the Software Asset Workspace. To view this report, navigate to **All** > **Software Asset** > **Software Asset Workspace**. From the Software Asset Workspace, navigate to **License usage** > **Reports** > **Licensable Software Products Deployed on Containers**.

Licensable Software Products Deployed on Containers report

Field	Description
Container Name	Docker container through which you are deploying a software product.
Environment	On-premise or cloud environment in which you are deploying a software product through the Docker container.
Container ID	Unique identifier for the Docker container.
Hosted On Server	Physical server on which the Docker container is running.
Kubernetes Cluster	Kubernetes cluster that enables the Docker container to run.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensable Software Products Deployed on Containers report (continued)

Field	Description
Virtual CPU	Number of virtual CPUs (vCPUs) that are assigned to the Docker container.
Software Installed	Software product that you are deploying through the Docker container.

Microsoft Server licensing on Microsoft Hyper-V virtualization technology

The Software Asset Management publisher pack for Microsoft supports licensing rules for Microsoft Server products, such as Microsoft Windows Server, that are deployed on Microsoft Hyper-V virtualization technology.

Hyper-V is a Microsoft hypervisor that enables you to create, manage, and run virtual machines (VMs) on a physical host, such as a server or computer. With this hardware virtualization capability, you can run multiple VMs on a single physical host while allowing them to share the underlying hardware resources of that host, such as the CPU, memory, storage, and networking. For more information on Hyper-V, see Hyper-V technology overview.

You can use a discovery tool, such as the ServiceNow® Discovery application, to automatically locate and identify the Hyper-V hypervisors and VMs in your environment, as well as the Microsoft Server products that are running on those VMs. For more information on this discovery process and the associated data models, see Hyper-V discovery.

You can license the Microsoft Server products, such as Microsoft SQL Server and Microsoft Windows Server, that are running in your Hyper-V virtualized environments by using licensing rules from Microsoft. If you are licensing Microsoft Windows Server at the physical layer, the **Licenses required** field in the License Metrics Results of the Microsoft publisher overview populates only for your parent Microsoft server, which represents your physical host. This licensing calculation is more intuitive and aligned with your discovered data. For more information on Microsoft server licensing, see Microsoft Per Core licensing rules and Microsoft Per Core (with CAL) licensing rules. For more information on the Microsoft publisher overview, see Publisher overview for Microsoft in the Software Asset Workspace.

The Microsoft publisher pack also supports cost-based licensing optimizations that are specific to Microsoft Server products deployed on Hyper-V. For more information on these licensing optimizations, see Cost-based licensing optimization for Microsoft.

Microsoft SQL Server licensing in high availability configurations

The Software Asset Management publisher pack for Microsoft supports licensing rules for Microsoft SQL Server deployed through high availability and disaster recovery solutions, such as Always On availability groups.

Always On availability groups provide high availability (HA) and disaster recovery capabilities for your Microsoft deployments. Each availability group consists of a primary replica, which hosts the database or server that you are actively running, and up to eight secondary replicas, which host the passive databases or servers that you can fail over to in the event that the primary replica fails. These availability groups support failover environments that can help you reduce and prevent downtime in your deployments. For more information on Always On availability groups, see What is an Always On availability group?.

For each server operating system environment (OSE) that you're licensing using either a Microsoft SQL Server subscription license or Microsoft SQL Server license with active Software Assurance (SA) benefits, you can use the following secondary (passive) replicas in anticipation of a failover event:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- One secondary replica for high availability in a separate OSE
- One secondary replica for disaster recovery in a separate OSE

The primary (active) replica is automatically licensed by the Microsoft SQL Server license. However, the two secondary replicas don't need to be licensed separately as long as they're passive. The Software Asset Management application considers these secondary replicas as ignored installations. You can view more information about these ignored installations through the Progress indicators widget in the Microsoft publisher overview. For more information on the Microsoft publisher overview, see Publisher overview for Microsoft in the Software Asset Workspace.

You can use the ServiceNow® Discovery application to automatically locate and identify the Microsoft SQL Server Always On availability groups across your deployment. As part of this discovery process, the application identifies the infrastructure and attributes of each availability group, including the Role (active or passive replica), Availability Mode (synchronous or asynchronous), Failover Mode (automatic or manual), and Readable Secondary (yes or no). The Software Asset Management application then uses this information and the applicable licensing rules to calculate your license compliance position for Microsoft SQL Server.

For more information on Microsoft SQL Server licensing, see Microsoft Per Core licensing rules. For more information on Always On availability group discovery, see Microsoft SQL Server and Cluster discovery.

Manage licenses for Microsoft Visual Studio

Manage your Visual Studio subscriptions with the Software Asset Management publisher pack for Microsoft. Verify license compliance and detect unlicensed installations. Reduce licensing costs by identifying subscriptions that are allocated but aren't being used.

Before you begin

Set up ServiceNow Discovery to find Microsoft software installations on your network. By using Discovery, you can view license compliance information by comparing your purchased licenses with actual installations.

You must set up the environment on the Configuration Management Database (CMDB) before you begin. Setting up of development, production, or test environment helps Software Asset Management Professional to apply licenses correctly. You should use the#Environment field#on the configuration item (CI).

Role required: sam_admin

About this task

Visual Studio subscriptions enable developers to download, install, configure, and use most Microsoft software products on any number of devices or virtual machines without having to purchase individual rights. Individual rights aren't required if the software is deployed only in development or test environments. Use the Microsoft Publisher Pack to manage Visual Studio licensing and reduce compliance risks.

To access the advantages of Visual Studio Standard subscriptions, you must maintain active Microsoft Software Assurance. These benefits enable you to use a range of Microsoft products, including SQL Server, Windows Server for development and testing purposes only.

First, set up software models and entitlements to track your Visual Studio subscriptions. Then, run reconciliation and view the License Workbench to manage license compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Import software entitlements for your Visual Studio subscriptions.

   Important: Fill in the **Publisher part number** column on the entitlement import template to automatically create software models for Visual Studio and all included software (suite components). You can look up publisher part numbers in the Software Product Definition table [samp_sw_product_definition]. If you fill in the **Publisher part number** field, **Publisher**, **Product**, **Version**, **Edition**, **Platform**, and **Language** aren't required because the publisher part number provides that information.

   When the import is complete, software models and entitlements are automatically created for your Visual Studio subscriptions. The Visual Studio software models are automatically populated with Suite Components and Downgrade Rights.

   You can also create software entitlements manually. For details, see Create entitlements in workspace.

   Important: You can view your software models in both the Software Asset Management classic application and the Software Asset Workspace.

2. Add product install conditions to your Visual Studio software models that apply across all software models including downgrades and editions.
   Install conditions define where the software can be installed. For Visual Studio, installing the software anywhere that is not a development or test environment is a violation of the Microsoft license agreement. Install conditions are used during reconciliation. When you run reconciliation, any Microsoft software installed on production, disaster recovery, or other environments aren't covered by your Visual Studio licenses. These products are considered unlicensed installations unless they're covered by another Microsoft license.

   For details on adding product install conditions, see Create product install conditions.

   You can add filter conditions to the Product install condition field to limit installations to your development or test environments. For example, you could use the conditions `Installed on contains dev` or `Installed on contains test`.

3. Add user allocations to your Visual Studio entitlements.
   You can import user allocations using an import set and transform map. Import into the User Allocation [alm_entitlement_user] table. In the transform map, map the **Assigned to** field to the User table [sys_user]. Use the **Asset tag** field from the entitlement record to link the allocations to the correct entitlements. For the coalesced value, use a two-attribute coalesce on the entitlement and the user.

   For more information, see Import sets.

   Additionally, you can change the inference percent of the Visual Studio software models. The inference percent specifies what percentage of the components must be installed for the suite. It can be 0% in most cases. Also, verify that the Visual Studio community edition is free. For more details on adding inference percent and product licensability at the edition level, see Create a software model in the Software Asset Workspace.

What to do next

Run a reconciliation to view your Visual Studio license compliance. Reconciliation runs weekly or on demand. Reconciliation compares your purchased Visual Studio rights recorded in software entitlements with actual installations found by Discovery. To view reconciliation results in a simplified workbench view, navigate to **Software Asset** > **Reconciliation** > **License Workbench**. For more information, see Software reconciliation for compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cost-based licensing optimization for Microsoft

The cost-based licensing optimization for Microsoft helps you determine the most optimal way to license your Microsoft software products across hybrid infrastructures. With this optimization, you can automatically balance license compliance with cost effectiveness to maximize cost savings.

Note: This licensing optimization is automatically included in the Software Asset Management Professional (com.snc.samp) plugin, meaning that you do not have to optimize and manage allocations for your Microsoft software rights manually. However, you can choose to manage your allocations manually if the recommended licensing optimizations do not follow your organization's licensing strategy. See Allocation Management on ServiecNow SAM Pro for more details on manual allocation management.

Note: You can bypass this licensing optimization in your hypervisor clusters by applying preferred licensing assignments to the Microsoft software products that are deployed on those clusters. For more information on preferred licensing assignments, see Create preferred licensing assignments for Microsoft software products deployed on clusters.

This licensing optimization is supported by the following Microsoft license types:

- Per core licenses for Microsoft SQL Server and Microsoft BizTalk Server
- Per core (with CAL) licenses for Microsoft Windows Server, Microsoft Core Infrastructure Server, and Microsoft System Center

See Supported Microsoft license types for more information on per core and per core (with CAL) licenses.

Licensing optimization benefits

This licensing optimization provides the following benefits:

- Helps you determine the cost savings that you have already achieved through your current software entitlement and infrastructure setup.
- Helps you determine if you can achieve further cost savings by following recommended licensing optimizations.
- Helps you gain insight into each of the recommended licensing optimizations so that you can understand the reasoning behind them and determine if you want to follow or ignore them.

Licensing optimization for Microsoft Server products deployed on Microsoft Hyper-V virtualization technology

For Microsoft Windows Server Standard deployments on Microsoft Hyper-V virtualization technology, the Software Asset Management application supports a specialized licensing optimization that can help you achieve better cost efficiency. With this licensing optimization, the Software Asset Management application first licenses the physical hosts that contain Microsoft Windows Server Standard installations. It then licenses the individual VMs that contain Microsoft Windows Server Standard installations. This optimization strategy combines licensing at both the physical host layer and virtual layer, which can help reduce licensing requirements and costs.

Understanding your licensing optimizations

You can view and gain insight into your recommended licensing optimizations by using the following tables and views:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- To view in-depth details about each of your recommended licensing optimizations, including the recommended license type and recommend license consumption layer, use the Microsoft Core License Optimization Reports [samp_ms_optimization_report] table. See View realized and potential cost-based licensing optimizations for Microsoft for more details on this table.
- To view all recommended licensing optimizations for a specific Microsoft cluster, use the SAM Cluster 360° view. See Understanding your cluster infrastructure for more information on this view.
- To view the potential cost savings that you can achieve through your recommended licensing optimizations, use the On-Premises potential savings by optimizing licenses report in the Optimization and savings dashboard of the Software Asset Workspace. See Optimization and savings dashboard in workspace for more information on the dashboard. See Publisher optimizations for Microsoft for more information on the report.
- To view the actual cost savings that you have already achieved through your current software entitlement and infrastructure setup, use the On-Premise optimization realized savings report in the Optimization and savings dashboard of the Software Asset Workspace. See Optimization and savings dashboard in workspace for more information on the dashboard. See Publisher optimizations for Microsoft for more information on the report.

Microsoft cost-based licensing optimization example

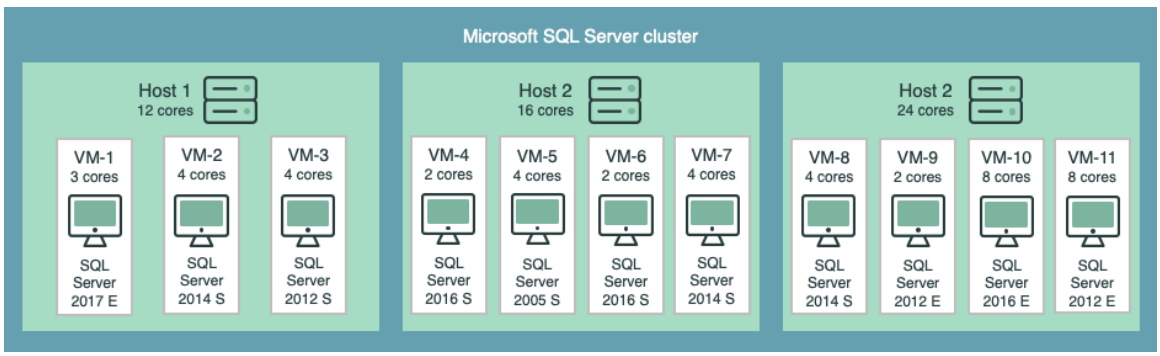
This example demonstrates how a software asset manager can optimize Microsoft SQL Server licensing in a cluster deployment.

In this example, a software asset manager is managing the following Microsoft SQL Server entitlements:

Microsoft SQL Server entitlements

Entitlement Name	License Type	Number of Purchased Rights	Cost Per Core
SQL Server Enterprise Licenses	SQL Server 2019 Enterprise Core with Software Assurance	1800	$5000
SQL Server Standard Licenses	SQL Server 2019 Standard Core with Software Assurance	600	$1300

The following infrastructure is a VMware cluster that consists of three physical hosts. Each physical host contains virtual machines (VMs) that are running various versions and editions of Microsoft SQL Server. These VMs may potentially be moving across all physical hosts within the cluster.



Based on the available entitlements and the cluster infrastructure, the software asset manager can license the cluster using one of the following options:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensing options

Option Number	License Type	Licensing Layer	Number of Rights Required on Each Host or VM	Total Number of Required Rights	Total Approximated Cost
1	SQL Server 2019 Enterprise Core with Software Assurance	Physical host layer	• Host 1: 12 rights • Host 2: 16 rights • Host 3: 24 rights	12 rights (Host 1) + 16 rights (Host 2) + 24 rights (Host 3) = 52 rights total	52 rights X $5000 = $260,000
2	SQL Server 2019 Enterprise Core with Software Assurance	Virtual layer	• VM-1: 4 rights • VM-2: 4 rights • VM-3: 4 rights • VM-4: 4 rights • VM-5: 4 rights • VM-6: 4 rights • VM-7: 4 rights • VM-8: 4 rights • VM-9: 4 rights • VM-10: 8 rights • VM-11: 8 rights	4 rights (VM-1) + 4 rights (VM-2) + 4 rights (VM-3) + 4 rights (VM-4) + 4 rights (VM-5) + 4 rights (VM-6) + 4 rights (VM-7) + 4 rights (VM-8) + 4 rights (VM-9) + 8 rights (VM-10) + 8 rights (VM-11) = 52 rights total	52 rights X $5000 = $260,000
3	Both SQL Server 2019 Enterprise Core with Software Assurance and SQL Server 2019 Standard Core	Virtual layer	• SQL Server 2019 Enterprise Core with Software Assurance:	• SQL Server 2019 Enterprise Core with Software Assurance: 4 rights (VM-1) + 4 rights (VM-9) + 8 rights (VM-10) + 8 rights (VM-11) = 24 rights total	(24 rights X $5000) + (28 rights X $1300) = $156,400

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensing options (continued)

Option Number	License Type	Licensing Layer	Number of Rights Required on Each Host or VM	Total Number of Required Rights	Total Approximated Cost
	with Software Assurance		○ VM-1: 4 rights ○ VM-9: 4 rights ○ VM-10: 8 rights ○ VM-11: 8 rights • SQL Server 2019 Standard Core with Software Assurance: ○ VM-2: 4 rights ○ VM-3: 4 rights ○ VM-4: 4 rights ○ VM-5: 4 rights ○ VM-6: 4 rights ○ VM-7: 4 rights ○ VM-8: 4 rights	• SQL Server 2019 Standard Core with Software Assurance: 4 rights (VM-2) + 4 rights (VM-3) + 4 rights (VM-4) + 4 rights (VM-5) + 4 rights (VM-6) + 4 rights (VM-7) + 4 rights (VM-8) = 28 rights total	

The software asset manager determines that option number 3 is the most cost-effective licensing solution for the cluster. By using this licensing option, the software asset manager can achieve a total cost savings of approximately $103,600.

View realized and potential cost-based licensing optimizations for Microsoft

View the realized and potential cost-based licensing optimizations for your Microsoft software products. Gain an in-depth understanding of each licensing optimization so that you can maximize cost savings across your Microsoft deployments.

Before you begin

Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

The Software Asset Management publisher pack for Microsoft supports cost-based licensing optimizations for Microsoft. These licensing optimizations enable you to determine the most cost-effective licensing solutions for your Microsoft software products across hybrid infrastructures.

You can view in-depth details about your realized and potential licensing optimizations in the Microsoft Core License Optimization Reports [samp_ms_optimization_report] table. This table can help you

- gain insight into the licensing optimizations that have already been implemented across your Microsoft deployments,
- gain insight into the recommended licensing optimizations that can potentially bring you additional savings,
- better understand your Microsoft license consumption,
- determine the cost savings that you have achieved by using the Software Asset Management application to track and manage your Microsoft licenses,
- and download optimization reports that you can share with other users in your organization.

For more information on cost-based licensing optimizations, see Cost-based licensing optimization for Microsoft.

Procedure

1. On the page header of your ServiceNow instance, select **All**.
2. In the menu navigation filter, enter `samp_ms_optimization_report_list.do`.
   The Microsoft Core License Optimization Reports [samp_ms_optimization_report] table opens.
3. View your realized and potential cost-based licensing optimizations for Microsoft.

   The Microsoft Core License Optimization Reports [samp_ms_optimization_report] table provides detailed information about each realized and potential licensing optimization, including the recommended license type, the recommend license consumption layer, and the potential and realized cost savings. For a detailed description of each field in this table, see Microsoft Core License Optimization Reports fields.

Create preferred licensing assignments for Microsoft software products deployed on clusters

Create and define preferred licensing assignments for the Microsoft software products that are deployed on your hypervisor clusters. Use these assignments to specify whether you want to license each software product at either the physical host layer or virtual layer.

Before you begin

Role required: sam_admin

About this task

Note: Preferred licensing assignments support only the per core and per core (with CAL) license metrics.

Preferred licensing assignments take precedence over the cost-based licensing optimizations that are recommended by default. By using a preferred licensing assignment, you can bypass these recommended licensing optimizations to better align with your organization's predetermined licensing strategy. For more information on cost-based licensing optimizations, see Cost-based licensing optimization for Microsoft.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: You can alternatively license a Microsoft software product on a specific physical host, virtual machine (VM), user, or device by adding allocations directly to the corresponding software entitlement. ServiceNow recommends that you use either preferred licensing assignments only or allocations only on each hypervisor cluster. For more information on adding allocations to a software entitlement, see Create entitlements in workspace.

Procedure

1. On the page header of your ServiceNow instance, select **All**.
2. In the menu navigation filter, enter `samp_device_license_assignment_list.do`. The Cluster License Assignments [samp_device_license_assignment] table opens.
3. Select **New**.
4. On the form, fill in the fields.

Cluster License Assignment form

Field	Description
License metric	License metric that you're using to reconcile the Microsoft software product. Select either **Per core** or **Per core (with CAL)**.
Product version	Version of the Microsoft software product that you want to specify the licensing layer for. **Note:** If you don't specify a product version, the Software Asset Management application automatically selects the most cost effective version for the licensing assignment.
Licensing layer	Layer that you want to license the Microsoft software product on. The options are **Physical** and **Virtual**.
Product	Microsoft software product that you want to specify the licensing layer for.
Cluster	Hypervisor cluster that you have deployed the Microsoft software product on.
Product edition	Edition of the Microsoft software product that you want to specify the licensing layer for. **Note:** If you don't specify a product edition, the Software Asset Management application automatically selects the most cost effective edition for the licensing assignment.
Domain	Domain that the licensing assignment is available in.

5. Select **Submit**.

Result

The preferred licensing assignment is applied to the Microsoft software product.

Optimizing license consumption for Microsoft SQL Server databases and components

You can optimize the license consumption for your Microsoft SQL Server databases and components based on the component editions that are identified through ITOM Discovery.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: To identify the editions of your Microsoft SQL Server components through ITOM Discovery, you must request and install version 1.7.0 or later of the Discovery and Service Mapping Patterns application from the ServiceNow Store.

Note: Both Microsoft SQL Server databases and components consume licenses against the associated Microsoft SQL Server edition. For Microsoft SQL Server components, the ServiceNow® Content Service team automatically associates each component with an appropriate Microsoft SQL Server edition based on the edition of the component. By optimizing the license consumption for your databases and components, you are optimizing licensing for Microsoft SQL Server and its component editions.

ITOM Discovery locates and identifies the Microsoft SQL Server databases and components across your deployment. When it locates and identifies your Microsoft SQL Server components, it also identifies the edition of each component. The Software Asset Management application then creates a software installation record for each of your components based on the identified component edition. The Software Asset Management application also create a software installation record for each of your Microsoft SQL Server databases. You can use these software installation records to reconcile your components and databases based on both the associated Microsoft SQL Server edition and the following Microsoft SQL Server licensing rules:

- If your Microsoft SQL Server database and components are deployed on the same device, only one license must be consumed on the device.
- If your Microsoft SQL Server database and components are deployed on different devices, separate licenses must be consumed on each device.

For more information on Microsoft SQL Server component edition discovery, see MSSQL server discovery.

Reconciling Microsoft SQL Server components based on the discovered component editions

You can reconcile Microsoft SQL Server components based on the discovered component editions so that licenses are optimally consumed against the appropriate Microsoft SQL Server editions.

When you create software models for your various Microsoft SQL Server editions, such as Microsoft SQL Server Standard or Enterprise edition, your Microsoft SQL Server components are automatically associated with an appropriate model based on mappings that are provided by the ServiceNow® Content Service team. Mappings between your Microsoft SQL Server software models and components are based on the edition of each component. The Content Service team provides these mappings through predefined discovery maps (DMAPs) in the software library, which is a centralized repository of software content that you can use to normalize your discovered data. Each DMAP associates a software model with relevant software content, such as software model suite relationships and software product lifecycles. For more information on the Content Service and software library, see Software Asset Management Content Service.

The Software Asset Management application considers software model suites during reconciliation so that you can accurately count your software rights and optimize your licenses, as child components are licensed against the parent software model and not the component itself. Reconciliation runs automatically as a scheduled job. However, you can also run reconciliation on-demand between scheduled jobs. For more information on software model suites, see Software Asset Management software suites. For instructions on how to run reconciliation manually through the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic. For instructions on how to run reconciliation manually through the Software Asset Workspace, see Run software reconciliation in the workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Importing Microsoft entitlements from a Microsoft License Statement (MLS)

You can import entitlements from an MLS to automatically define the license details and license agreements that are matched to your Microsoft software models.

An MLS is a report that contains a comprehensive inventory of licensing information for each of your Microsoft products. This report provides an in-depth look into your company's entire license transaction history, which you can use to better forecast your Microsoft licensing needs.

Each MLS contains the following information:

- **Organization Summary**: Scope of the MLS, including the MLS type and the organizations that are associated with the MLS.
- **License Summary**: Summary of the licenses that you are entitled to use.
- **Transaction Summary**: Detailed transaction information for each license.
- **License Agreement**: License agreements that are associated with each license.
- **Transaction Data**: Additional transaction information for each license.
- **Frequently Asked Questions and Glossary**: Answers to frequently asked questions and definitions for common Microsoft terminology.
- **Pivot Data**: Data that you can use to generate a license position for Microsoft.

When you import licensing information from an MLS, Software Asset Management automatically creates entitlements and license agreements using data from only the **Transaction Data** tab of the MLS.

Import Microsoft entitlements from a Microsoft License Statement (MLS) in Software Asset Management classic

Import entitlements from an MLS using the Software Asset Management classic application.

Before you begin

Before you can import entitlements from an MLS, you must request the MLS from Microsoft. Microsoft provides the MLS as an Excel file.

Role required: sam_user or sam_admin

Procedure

1. On the page header of your ServiceNow® instance, select **All**.
2. In the menu navigation filter, enter `samp_bulk_import_list.do`.
   The Entitlement Imports [samp_bulk_import] table opens.
3. Select **New**.
4. On the Entitlement Import form, fill in the fields.

Entitlement Import form

Field	Description
Import type	Type of document that you're importing software entitlements from. The options are **Standard import document** and **Microsoft license statement (MLS)**. Set this field to **Microsoft license statement (MLS)**.
File	Spreadsheet of software entitlements that you want to import. Select **Click to add...** to search for and select the MLS Excel file that you requested from Microsoft.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Description	Brief description of the software entitlement import.
Automatic creation of contracts	Option to enable automatic creation of both parent and child contracts for the selected MLS. Refer to Contracts for more information about contracts.
Import status	Status of the import. This field populates automatically.

5. Select **Import**.
   A confirmation message appears, informing you that the import is in progress. You can select the link in the message to open the Entitlement import list in the Software Asset Workspace, which provides the status of your import and the complete list of entitlement imports.
6. After the import is complete, open the corresponding entitlement import record to view additional information about the import.

   a. From the Entitlement Imports [samp_bulk_import] table, select your MLS entitlement import.

   b. Use the following options to view additional information about the import:

   - To view additional information about the import status, refer to the following fields:

Import status fields

Field	Description
Import status	Status of the import.
Number of rows processed	Number of Excel rows that were processed during the import.
Number of rows successful	Number of Excel rows that imported successfully.
Number of rows with errors	Number of Excel rows that imported with errors.
Number of entitlements in build state	Number of imported Microsoft Software Assurance (SA), Step-up, From SA, or Add-on entitlements that are in the build state and can be linked to a base entitlement.

   - To view the complete list of imported entitlements, select the **Entitlements** related list.
   - If you enabled the **Automatic creation of contracts** option in step 4, view the list of automatically created contracts by selecting the **Contracts** related list.

     Note: These contracts are automatically linked to successfully imported entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- To view the list of imported Microsoft SA, Step-up, From SA, or Add-on entitlements that are in the build state and can be linked to base entitlements, select the **Entitlements in build state** related list.

  See step 7 for more information on how to assign a Microsoft SA, Step-up, From SA, or Add-on entitlement to a base entitlement.

7. If your entitlement import contains any Microsoft SA, Step-up, From SA, or Add-on entitlements, assign those entitlements to base entitlements.

   Note: You can assign a From SA or Add-on entitlement to multiple base entitlements.

   a. On the Entitlement Import record, select the **Entitlements in build state** related list.

   b. From the list of available Microsoft SA, Step-up, From SA, or Add-on entitlements, select the entitlement that you want to assign to a base entitlement.

   c. On the corresponding Software Entitlement form, select **Publish**.

   d. After the form reloads, select the **Related Entitlements** tab.

   e. In the **Related Entitlement** column of the Related Entitlements list, double-click **Insert a new row**.

   f. When prompted, search for and select the base entitlement that you want to assign the Microsoft SA, Step-up, From SA, or Add-on entitlement to.

   Important: The base entitlement for a From SA or Add-on entitlement must use either the Per User or Per Device license metric. In addition, it cannot already be assigned with another entitlement or have any active allocations.

   Note: If an appropriate base entitlement isn't available for the given Microsoft SA, Step-up, From SA, or Add-on entitlement, you can create one.

   g. Select the Save (Enter) icon .

   h. Double-click the corresponding field in the **Active rights** column of the Related Entitlements list.

   i. When prompted, enter the number of Microsoft SA, Step-up, From SA, or Add-on rights that you want to grant to the base entitlement.

   Important: For From SA rights, you must enter the total number of rights that you purchased for the base entitlement. For example, if you purchased 100 rights for the base entitlement, you must grant 100 From SA rights to that entitlement. For Add-on rights, you can enter any number of rights equal to or less than the total number of rights that you purchased for the given Add-on entitlement.

   j. Select the Save (Enter) icon .

   k. Select **Save** on the Software Entitlement form header.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Microsoft SA, Step-up, From SA, or Add-on entitlement is assigned to the specified base entitlement.

l. Return to the Entitlement Import record and repeat steps a to k for each import that you want to resolve.

8. If your entitlement import contains any errors, identify and resolve those errors.

   a. On the Entitlement Import record, select **Review import errors**.
   The Entitlement Import Errors list opens.

   b. In the **Error status** field, select **Needs review** for the error that you want to resolve.

   c. Update the corresponding Entitlement Import Error form as needed to resolve the error. For descriptions of the Entitlement Import Error form fields, see Entitlement import error fields. For details about the actions that you can take on entitlement import errors, see Entitlement import error actions.

   d. Select **Import**.
   The associated entitlements are reimported without any errors, and you automatically return to the Entitlement Import form.

   e. Repeat steps a-d for each error that you want to resolve.

Import Microsoft entitlements from a Microsoft License Statement (MLS) in the Software Asset Workspace

Import entitlements from an MLS using the Software Asset Workspace.

Before you begin

Before you can import entitlements from an MLS, you must request the MLS from Microsoft. Microsoft provides the MLS as an Excel file.

Role required: sam_user or sam_admin

Procedure

1. From your ServiceNow instance, navigate to **Software asset** > **Software Asset Workspace**.
   The Software Asset Workspace launches in a new tab, displaying the Software asset overview.
2. On the Software asset overview, select **Create entitlement**.
   The Create new entitlement dialog box opens.
3. In the dialog box, select **Import multiple entitlements from an Excel file** and then select **Next**.
   The dialog box closes and then the Create New Entitlement Import form opens in a new tab.
4. On the form, fill in the fields.

Create New Entitlement Import form

Field	Description
Import type	Type of document that you are importing entitlements from. Set this field to **Microsoft license statement (MLS)**.
File	File that you want to import entitlements from. Search for and select the MLS Excel file that you requested from Microsoft.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Description	Description of the entitlement import. This field populates automatically based on the file that you selected in the **File** field.
Automatic creation of contracts	Option to enable automatic creation of both parent and child contracts for the selected MLS. Refer to Contracts for more information about contracts.
Import status	Status of the import. This field populates automatically.

5. Select **Import**.
   A confirmation message appears, informing you that the import is in progress. You can select the link in the message to open the Entitlement import list, which provides the status of your import and the complete list of entitlement imports.
6. After the import is complete, open the corresponding entitlement import record to view additional information about the import.

   a. From the Entitlement import view, select your MLS entitlement import.
   The corresponding entitlement import record opens.

   b. Use the following options to view additional information about the import:

   - To view additional information about the import status, refer to the following fields on the **Details** tab:

Import status fields

Field	Description
Import status	Status of the import.
Number of rows processed	Number of Excel rows that were processed during the import.
Number of rows successful	Number of Excel rows that imported successfully.
Number of rows with errors	Number of Excel rows that imported with errors.
Number of entitlements in build state	Number of imported Microsoft Software Assurance (SA), Step-up, From SA, or Add-on entitlements that are in the build state and can be linked to a base entitlement. See step 7 for more information on how to assign a Microsoft SA, Step-up, From SA, or Add-on entitlement to a base entitlement.

   - To view the complete list of imported entitlements, select the **Entitlements** tab.
   - If you enabled the **Automatic creation of contracts** option in step 4, view the complete list of automatically created contracts on the **Contracts** tab.

     Note: These contracts are automatically linked to successfully imported entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. If your entitlement import contains any errors, identify and resolve those errors.

   a. On the entitlement import record, select **Review import errors**.
   The corresponding Review entitlement import errors view opens.

   b. Use one or both of the following options to resolve your import errors:

   - Resolve errors related to your imported entitlements.

     i. Select the **Import errors** tab.

     ii. In the **Error status** field, select **Needs review** for the error that you want to resolve.

     The corresponding entitlement import error record opens in a new tab.

     iii. Update the record as needed to resolve the error.

     For descriptions of the entitlement import error fields, see Entitlement import error fields. For details about the actions that you can take on entitlement import errors, see Entitlement import error actions.

     iv. Select **Import**.

     The associated entitlements are re-imported without any errors.

     v. Close the record to return to the Review entitlement import errors view.

     vi. Repeat steps i-v for each error that you want to resolve.

   - Resolve errors in which imported Microsoft SA, Step-up, From SA, or Add-on entitlements are not assigned to any base entitlements.

     Note: You can assign a From SA or Add-on entitlement to multiple base entitlements.

     i. Select the **Relate entitlements** tab.

     ii. From the list of available Microsoft SA, Step-up, From SA, or Add-on entitlements, select the entitlement that you want to assign to a base entitlement.

     iii. On the software entitlement record, select **Publish**.

     iv. After the record reloads, select the **Related Entitlements** tab and then select **New**.

     v. On the form, fill in the fields.

Create New Related Entitlement form

Field	Description
Domain	Domain that the base entitlement applies to. The default value is **global**.
Software Entitlement	Microsoft SA, Step-up, From SA, or Add-on entitlement that you want to assign to a base entitlement. This field populates automatically.
Related Entitlement	Base entitlement that you want to assign your Microsoft SA, Step-up, From SA, or Add-on entitlement to. **Important:** The base entitlement for a From SA or Add-on entitlement must use either the Per User or Per Device license metric. In addition, it cannot already be assigned with another entitlement or have any active allocations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If an appropriate base entitlement is not available for the given Microsoft SA, Step-up, From SA, or Add-on entitlement, you can create one.
Active rights	Number of Microsoft SA, Step-up, From SA, or Add-on rights that you want to grant to the base entitlement. **Important:** For From SA rights, you must enter the total number of rights that you purchased for the base entitlement. For example, if you purchased 100 rights for the base entitlement, you must grant 100 From SA rights to that entitlement. For Add-on rights, you can enter any number of rights equal to or less than the total number of rights that you purchased for the given Add-on entitlement.

vi. Select **Save**.

vii. Close the software entitlement record to return to the Review entitlement import errors view.

viii. Repeat steps i-vii for each Microsoft SA, Step-up, From SA, or Add-on entitlement that you want to assign to a base entitlement.

Windows and SQL Server Infrastructure report

You can use the Windows and SQL Server Infrastructure report to gain visibility into the infrastructure details for all physical hosts and virtual machines (VMs) that are running Microsoft Windows Server or Microsoft SQL Server across your on-premise and public cloud environments, such as AWS and Microsoft Azure.

The Windows and SQL Server Infrastructure report is available in both the Software Asset Workspace and the Software Asset Management classic application.

To view this report in the Software Asset Workspace, navigate to **Workspaces** > **Software Asset Workspace**. From the Software Asset Workspace, navigate to **License usage** > **Reports** > **Windows and SQL Server Infrastructure**.

To view this report in the Software Asset Management classic application, navigate to **All** > **Reports** > **View/Run**. From the list of available reports, search for and select **Windows and SQL Server infrastructure details report**. When the corresponding Edit report page opens, select **Run**.

Windows and SQL Server infrastructure report

Field	Description
Deployment type	Type of deployment that the physical host or VM is running in. The options are **On premise** and **Cloud**.
Cloud provider	Cloud provider that Microsoft Windows Server or Microsoft SQL Server is deployed on. The options are **AWS** and **Microsoft Azure**. **Note:** This field is applicable for cloud deployments only.
vCenter	VMware vCenter Server that you are using to manage the physical host or VM in a virtual VMware vSphere environment.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Windows and SQL Server infrastructure report (continued)

Field	Description
	Note: This field is applicable only if you are using VMware virtualization technology.
Cluster	Cluster that the physical host or VM resides in.
Host	For physical hosts, this field identifies the host that Microsoft Windows Server or Microsoft SQL Server is installed on. For VMs, this field identifies the physical host that the VM is running on.
Host processor count	Number of CPUs that are assigned to the physical host.
Host core count	Number of cores within each CPU that is assigned to the physical host.
Virtualization technology	Virtualization technology that you are using to deploy and manage your physical hosts and VMs.
Virtual server	VM on which you are running Microsoft Windows Server or Microsoft SQL Server. **Note:** If a VM resides in an on-premise cluster, it can migrate to any physical host within that cluster. Additionally, if you are using VM-Host affinity rules to specify the physical hosts on which a VM can run, the VM can migrate to any physical host that is specified in those rules. In these scenarios, the same VM can appear on the Windows and SQL Server Infrastructure report multiple times based on the physical hosts to which it can migrate. **Note:** This field is applicable for VMs only.
Windows Server installation	Microsoft Windows Server version that is installed on the physical host or VM. If multiple Microsoft Windows Server versions are installed on the same host or VM, this field displays all installed versions using a comma-separated list.
SQL Server installation	Microsoft SQL Server version that is installed on the physical host or VM. If multiple Microsoft SQL Server versions are installed on the same host or VM, this field displays all installed versions using a comma-separated list.
VM processor count	Number of virtual CPUs (vCPUs) that are assigned to the VM. **Note:** This field is applicable for VMs only.
VM core count	Number of virtual cores within each vCPU that is assigned to the VM. **Note:** This field is applicable for VMs only.
VM CPU thread count	Number of threads that divide each virtual core within the vCPUs that are assigned to the VM.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Windows and SQL Server infrastructure report (continued)

Field	Description
	Note: This field is applicable for VMs only.
Cloud host type	Type of cloud host that the VM is running on. The options are **Shared** and **Dedicated**. **Note:** This field is applicable for cloud deployments only.
Cloud license type - Windows Server	Cloud license type of the Microsoft Windows Server installation. The options are **BYOL** and **License Included**. **Note:** This field is applicable for cloud deployments only.
Cloud license type - SQL Server	Cloud license type of the Microsoft SQL Server installation. The options are **BYOL** and **License Included**. **Note:** This field is applicable for cloud deployments only.

Microsoft dashboards in Software Asset Management classic

View installations, cost, and compliance for Microsoft software such as SQL Server in the Software Asset Management classic application. View subscription use, cost, and compliance for Microsoft 365.

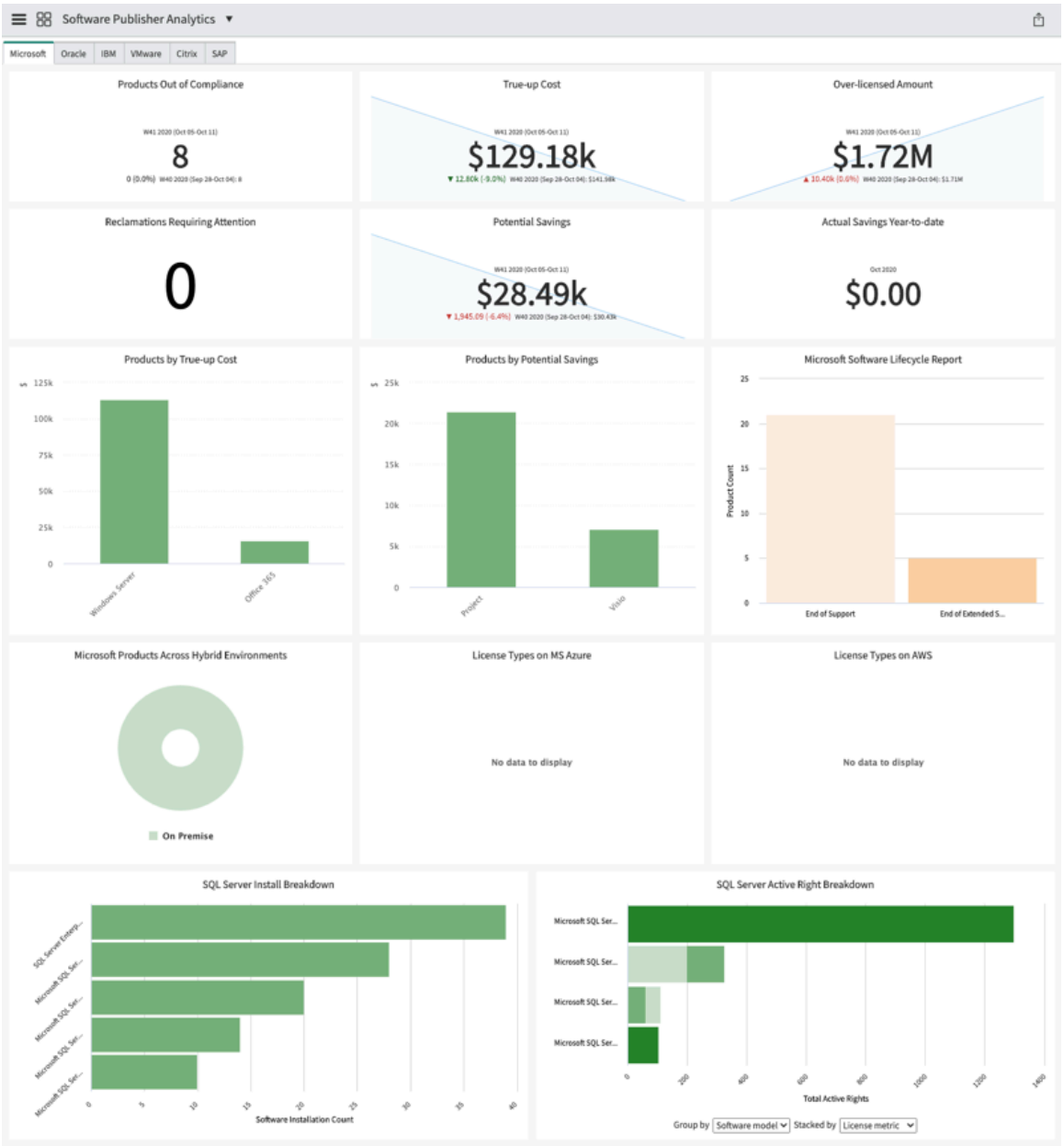
Note: The add-on Microsoft publisher pack (com.snc.samp.microsoft) plugin must be installed to view the dashboards.

Dashboards are updated whenever a new reconciliation result is available. You can save charts in PNG or JPG format.

Software Publisher Analytics dashboard for Microsoft

Access the Software Publisher Analytics dashboard for Microsoft by navigating to **Software Asset** > **Publisher Overview**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Microsoft tab

Report	Source list	Description
Products out of Compliance	Product Results	Number of products that have at least one software model out of compliance. Select the report to view the results in the License Workbench.
True-up Cost	Product Results	Cost to be compliant based on the average prices for entitlements for the rights.
Over-Licensed Amount	Product Results	Cost of licenses owned but not being used.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

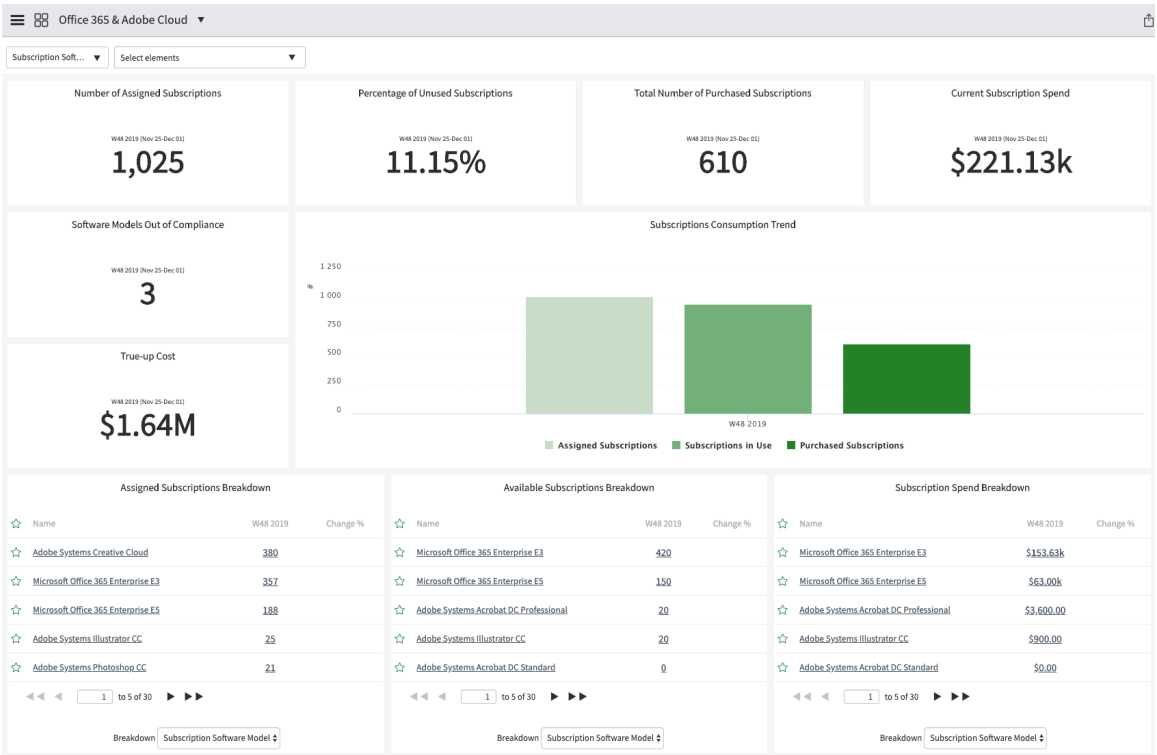
Microsoft tab (continued)

Report	Source list	Description
Reclamations Requiring Attention	Reclamation Candidates	State is Attention Required.
Potential Savings	Reclamation Candidates	Cost saved if removal candidates are reclaimed.
Actual Savings Year-to-date	Reclamation Candidates	Closed this Year and the State is set to Closed Complete.
Products by True-up Cost	Product Results	Greatest true-up costs by product.
Products by Potential Savings	Reclamation Candidates	Greatest potential savings by product.
Microsoft Software Lifecycle Report	Software Lifecycle Report	Number of products in each software lifecycle phase, including End of Extended Support, End of Life, and End of Support.
Microsoft Products Across Hybrid Environments	Software Installations	Distribution of Microsoft products across on-premise and cloud environments.
License Types on Microsoft Azure	Software Installations	License types used on Microsoft Azure.
License Types on AWS	Software Installations	License types used on AWS.
SQL Server Install Breakdown	Software Installations	Total software installations per SQL Server.
SQL Server Active Right Breakdown	Software Entitlements	Number of total active rights per SQL Server.

Office 365 & Adobe Cloud dashboard

Only Microsoft 365 software products that are recognized as subscription software are shown. Microsoft Office 365 integration must be set up to view compliance information.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Report	Source list	Description
Number of Assigned Subscriptions	Software Subscriptions	Aggregate sum of the number of subscriptions that are used (for example, user accounts active).
Percentage of Unused Subscriptions	Software Subscriptions	Ratio of rights available to rights owned.
Total Number of Purchased Subscriptions	License Metric Results	Total number of rights owned.
Current Subscription Spend	License Metric Results	Aggregate sum of the total cost for subscription rights.
Software Models Out of Compliance	Software Model Results	Number of software models out of compliance. Select the report view the results in the License Workbench.
True-up cost	Software Model Results	Sum of true-up costs on the latest software model results.
Subscriptions Consumption Trend	Software Subscriptions License Metric Results	Trend assigned, active, and available subscriptions.
Assigned Subscription Breakdown	Software Subscriptions	Breakdown of assigned subscriptions by software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

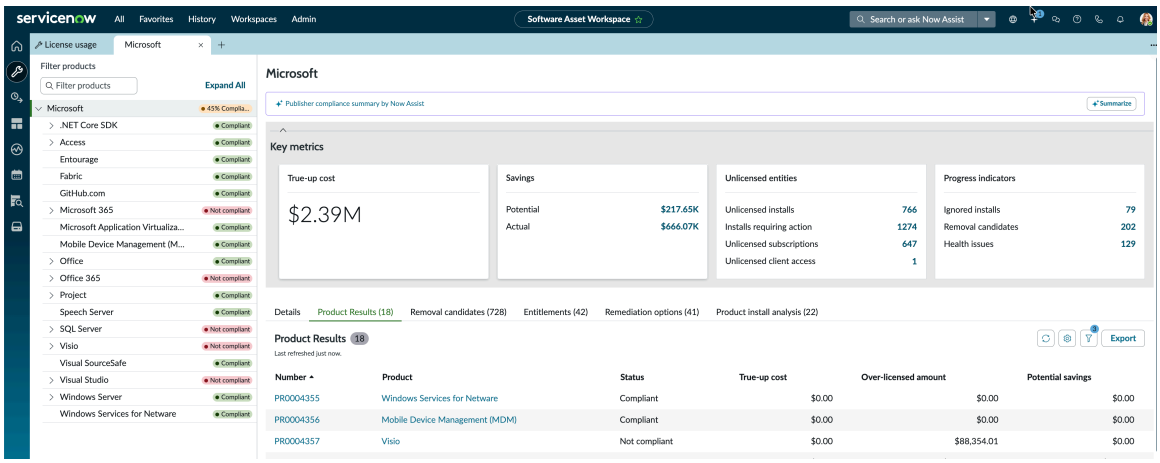
Report	Source list	Description
Available Subscription Breakdown	License Metric Results	Breakdown of total active rights by software model.
Subscription Spend Breakdown	License Metric Results	Breakdown of subscription total cost by product/version/ edition (software model).

Publisher overview for Microsoft in the Software Asset Workspace

View license usage information related to Microsoft in the publisher overview for Microsoft in the Software Asset Workspace.

From the Software Asset Workspace, access the Microsoft publisher overview by navigating to **License usage** > **Publishers** and then selecting **Microsoft** from the list of available software publishers.

Results are updated whenever a new reconciliation result is available.



You can view a summary of your license usage information in the Summary section of the Microsoft publisher overview.

Microsoft Summary

Report	Description
True-up cost	Cost to be compliant based on the average price of rights in your Microsoft software entitlements.
Potential savings	Potential cost savings for your Microsoft licenses.
Actual savings	Actual cost savings for your Microsoft licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft Summary (continued)

Report	Description
	• **Unlicensed installs**: Total number of unlicensed Microsoft software installations. Select the number to view the complete list of unlicensed Microsoft software installations. • **Installs requiring action**: Total number of Microsoft software installations that you must take action on. Select the number to view the complete list of these Microsoft software installations. • **Unlicensed subscriptions**: Total number of unlicensed Microsoft subscriptions. Select the number to view the complete list of unlicensed Microsoft subscriptions. • **Unlicensed client access**: Total number of unlicensed Microsoft client access records. Select the number to view the complete list of unlicensed Microsoft client access records.
Progress indicators	Summary of your license compliance progress. This summary includes the following indicators: • **Ignored installs**: Total number of Microsoft software installations that were ignored during reclamation. Select the number to view the complete list of ignored Microsoft software installations. • **Removal candidates**: Total number of Microsoft removal candidates. Select the number to view the list of all software removal candidates.

For more details on the license usage information that is provided in the publisher overview, see License usage publisher fields in workspace.

Supported Microsoft license types

The Software Asset Management publisher pack for Microsoft adds license metrics that are specific to Microsoft.

The license metrics are available when Microsoft is selected as the **Metric group** for the entitlement.

Note: For details on the license metrics that are supported by each Microsoft product, see License metrics for Microsoft products.

Per user licenses

A per user license is used when each user accessing the software is licensed, regardless of the number of devices they use to access the software.

To define the number of installations a user has, select the **Maximum installs per right** on the Metric Attribute related list of the associated software model. If the user exceeds the number of installations you've defined, additional rights are consumed until the user is fully licensed, or there are no more rights available.

You can manage user allocations for the per user license metric. Users are assigned a quantity of rights. Even if they don't need all of the allocations, the user will consume the number of rights you've allocated to them. If a user isn't assigned to a device, a right will be consumed for each unique device with a software installation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, a right is consumed for each unique user that has at least one installation of the software on any device assigned to them.

When a software model has downgrade or upgrade rights to another versions of a software product, rights are assigned to users with the specified versions of software installed after the primary version of the software has been fully licensed.

Per device licenses

A per device license is used when each device accessing the software is licensed, regardless of the number of users accessing the software.

To define the number of installations a device can have, select the **Maximum installs per right** on the Metric Attribute related list of the associated software model. If the device exceeds the number of installations you've defined, additional rights are consumed until the device is fully licensed, or there are no more rights available.

You can manage device allocations for the per device license metric. Devices are assigned a quantity of rights. Even if they don't need all of the allocations, the device will consume the number of rights you've allocated to them.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, a right is consumed for each unique device that has at least one installation of the software.

When a software model has downgrade or upgrade rights to another versions of a software product, rights are assigned to users with the specified versions of software installed after the primary version of the software has been fully licensed.

Per core licenses

A server processor is one of the main components of a server. Each server processor contains smaller processing units called cores and the number of cores your processor has is dependent on your system hardware.

System hardware runs in an operating system environment (OSE) and they act as middleware between the operating system and the software applications on your system. OSEs can be either physical or virtual. Depending on the OSE you have, your processor will be physical, virtual, or a combination of both.

Regardless of whether your processor is in a physical or virtual OSE, Microsoft requires that every processor core running SQL Server, Windows Server, or any of their components must be licensed. However, the number of core licenses you need will depend on whether you are licensing a physical server or an individual virtual OSE. The number of licenses you need is based on the core factor table provided by Microsoft.

Note: If you are licensing a Microsoft cluster that contains both physical servers and virtual OSEs, you can use cost-based licensing optimizations to determine if it is more cost-effective to license the physical servers only, virtual OSEs only, or a combination of both. See Cost-based licensing optimization for Microsoft for more information on these optimizations.

Use the per core license metric for any of your physical or virtual core-based licenses. If you are licensing a virtual OSE, you must use either an active Microsoft Software Assurance (SA) or Microsoft software subscription license.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, a check is done to see which edition of the software is installed. If the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

software is an Enterprise edition, a set number of rights are consumed based on the normalized core count on a physical server that has at least one installation of the Enterprise edition software in the physical operating system environment (OSE) or on a virtual machine (VM) hosted by the physical server. Another check is run to ensure that the number of OSEs that have an Enterprise edition install don't exceed the number of core rights applied to the physical server. If the number of OSEs exceeds the number of core rights, a core right will be consumed for each additional OSE. If the edition is anything but Enterprise, a right is still consumed for every core on a physical server that has at least one install in the physical OSE. The difference is the additional check. In this case, the check ensures that these other editions of software are only installed on the physical server.

If other editions of software are found in a virtual environment and no other rights are owned, then the reconciliation result will be not compliant.

You can manage device allocations. Devices are assigned a quantity of rights. Even if they don't need all of the allocations, the device will consume the number of rights you've allocated to them. For this license metric, all device allocations should be created against the physical server. No matter what edition of the software it is, if the normalized core count is less than the specified value in the **Minimum cores per processor metric** attribute related to the software model, then the minimum number of rights will be consumed.

For more information on Microsoft per core licenses, see Microsoft Per Core licensing rules.

Per core (with CAL) licenses

You can manage device allocations for this license metric. Devices are assigned a quantity of rights. Even if they don't need all of the allocations, the device will consume the number of rights you've allocated to them. For example, if a device allocation with a quantity of six is created for a server, but only four core rights are needed to fully license the server, six rights would still be consumed during reconciliation. The additional two rights would be considered allocated not in use in the reconciliation results.

For the Per core (with CAL) license metric, device allocations can be created against a physical server or virtual machine (VM). Device allocations that are created against a VM must be licensed using either an active Microsoft Software Assurance (SA) or Microsoft software subscription license. If the core count is less than the specified value in either the **Minimum cores per processor** or **Minimum cores per server** metric attributes of the software model, the minimum number of rights will be consumed.

> **Note:** If you are licensing device allocations on a Microsoft cluster that contains both physical servers and VMs, you can use cost-based licensing optimizations to determine if it is more cost-effective to license the physical servers only, VMs only, or a combination of both. See Cost-based licensing optimization for Microsoft for more information on these optimizations.

This license metric should be used with device or user CAL license metrics. You need to create software entitlements using those license metrics separately.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, a right is consumed for every core on a physical server that has at least one installation of the software in the physical OSE or on a virtual machine hosted by the physical server. A check runs to verify that the number of installations within an OSE and the number of active OSEs don't exceed the specified maximums you defined in the **Metric Attributes** related list on the Software Model form.

If the specified number of installs and OSEs are exceeded, core rights that are equal to the number of cores or minimum cores on either the physical server or VM will be consumed until all installs and OSEs are licensed or there are no more available rights.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information on Microsoft per core (with CAL) licenses, see Microsoft Per Core (with CAL) licensing rules.

User CAL licenses

A user CAL license is a client access license (CAL) that allows users to access a server to use its services, regardless of the number of devices the user uses to access the services.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, the number of rights consumed is equal to total user count in all client access records related to that software model.

Device CAL licenses

A device CAL license is a client access license (CAL) that allows a set number of devices to access a server to use its services, regardless of the number of users accessing the services from the device.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, the number of rights consumed is equal to total device count in all client access records related to that software model.

Server (per instance) licenses

A server (per instance) license is used to license a set number of software installations on either a physical server or virtual machine.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, a right is consumed for the number of installations that exist in an OSE. If the number of installations in an OSE exceeds the value specified in the maximum installs per OSE metric attribute, additional rights will be consumed until all installations on a physical server or virtual machine are licensed or there are no more rights variable.

You can manage device allocations. Devices are assigned a quantity of rights. Even if the software installations, the device will consume the number of rights you've allocated to them during reconciliation. For example, if a device allocation with a quantity of two is created for a server, but only one server (per instance) right is needed to fully license the server, two rights would still be consumed during reconciliation. The extra right would be marked as allocated no in use in the license metric results. Device allocations can be created against physical servers or virtual machines.

Server (per server) licenses

A server (per server) license is used to license all software installations on a physical server and any virtual machines hosted by the physical server.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, a right is consumed for every unique physical server. This license metric differs from the per device license metric, which consumes a right for every unique physical server and virtual machine that has a software installation.

You can manage device allocations. Devices are assigned a quantity of rights. Even if the software installations, the device will consume the number of rights you've allocated to them during reconciliation. For example, if a device allocation with a quantity of two is created for a server, but only one right is needed to fully license the server, two rights would still be consumed during reconciliation. The extra right would be marked as allocated not in use in the license metric results. Device allocations should be created against the physical server.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Per Processor licenses

A per processor licenses is used to license a number of processors on a physical server.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, a right is consumed for processors on a physical server that have at least one installation of the software in the physical OSE or on a virtual machine hosted by the physical server. The quantity of processors licensed by a single right is determined by the **Maximum processor per rights** on the Metric Attribute related list of the software model.

An additional check is done to ensure that the number of installations in an OSE and the number of OSEs on a server don't exceed the specified maximums in the **Maximum installs per OSE** and **Maximum active OSEs per server** Metric Attribute related list of the software model. If any of the metric attributes are exceeded, additional rights are consumed until all processors, installs, and OSEs are licensed, or there are no more available rights. Per processor rights cannot partially license a physical server or license software installations on two different physical servers.

You can manage device allocations. Devices are assigned a quantity of rights. Even if the software installations, the device will consume the number of rights you've allocated to them during reconciliation. All device allocations should be created against the physical server.

User Subscription licenses

User subscription licenses a user for the number of activated software subscriptions.

During reconciliation, for a software model that has one or more software entitlements that use this license metric, a right is consumed for each unique user that has at least one software subscription record associated with the software model. Any software installations that correspond with the software model will also be licensed. However, if a user has software installations, but no subscription record, that user will not consume a right and the installations will be unlicensed.

Software Assurance licenses

Microsoft Software Assurance (SA) is the maintenance program used by Microsoft to provide active maintenance to its users. For more information, see Software license maintenance.

Software Asset Management publisher pack for Oracle

Use the Software Asset Management publisher pack for Oracle to track and optimize licensing for your Oracle products.

The Oracle publisher pack supports the following Oracle products:

- Oracle Database
- Oracle Database options
- Oracle management packs
- Oracle WebLogic Server
- Oracle Java

To use the publisher pack, activate the Software Asset Management Professional for Oracle plugin (com.snc.samp.oracle).

Oracle licensing

The Oracle publisher pack adds Oracle specific licensing options for software entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software entitlement fields

Field	Options
Agreement Type	• Generic • Unlimited License Agreement (ULA)
License metric	• Named User Plus • Per Processor • Employee
Metric group	Oracle

Important: The Software Asset Management application supports Bring Your Own License (BYOL) for Oracle Database and WebLogic Server across hybrid infrastructures. With BYOL support, you can track licenses for your Oracle Database and WebLogic Server in both on-premise and public cloud environments. For more information about Oracle BYOL support, see Bring your own license or subscription to the public cloud.

Additionally, you can use the Oracle Global License Advisory Services (GLAS) to manage licensing of your deployed Oracle software products. For more information, see Oracle GLAS data collection.

Oracle license metrics

The Software Asset Management application supports the following license metrics for Oracle:

Named User Plus

The Named User Plus (NUP) license metric licenses all users and physical devices that access the following Oracle products:

- Oracle Database
- Oracle Database options
- Oracle management packs
- Oracle WebLogic Server

If a user operates a device that accesses any of these Oracle products, the NUP license metric licenses both the user and the device. Use this license metric in environments where users and devices are easily identifiable and countable.

Important: To use this license metric, you must create a corresponding client access record. Client access records enable you to track and manage the users or devices that are accessing a particular version of your software. The Software Asset Management application can then use the information in these client access records to reconcile your software. For more information on client access records, see Create a software client access record in workspace or Add a software client access record in Software Asset Management classic.

The NUP license metric implements different licensing minimums based on the Oracle Database or Oracle WebLogic Server edition that your users and devices are accessing.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle products and their licensing requirements

Oracle product edition	Licensing requirement
Oracle Database Standard Edition (SE) or Standard Edition One (SE1)	Minimum five NUP licenses required.
Oracle Database Standard Edition 2 (SE2)	Minimum 10 NUP licenses required per database server. Additionally, each SE2 database can use a maximum of 16 CPU threads at any given time.
Oracle Database Enterprise Edition	Minimum of either 25 NUP licenses per processor or the total number of users and devices that are accessing this database edition. The license metric sets this licensing minimum to the larger of the two values.
Oracle WebLogic Server Standard Edition	Minimum 10 NUP licenses per processor.
Oracle WebLogic Server Enterprise Edition	Minimum 10 NUP licenses per processor core.
Oracle WebLogic Suite Edition	Minimum 10 NUP licenses per processor core.

Licensing minimums are automatically applied to the software models for your Oracle products using the following metric attributes:

- **Minimum users per processor** (Oracle Database products)
- **Minimum NUPs for WebLogic on-premise deployments** (Oracle WebLogic Server products in on-premise environments)
- **Minimum NUPs for WebLogic cloud deployments** (Oracle WebLogic Server products in cloud environments)

The Software Asset Management application can then use the metric attribute values to determine the number of rights that are required for each Oracle product. To determine this number, the Software Asset Management application multiplies the appropriate metric attribute value by the number of processors or processor cores on the underlying physical server that the Oracle product is installed or running on. The resulting value is compared against the total number of users and devices that are accessing the Oracle product. The number of required rights is set to the larger of the two values.

For example, 20 users are accessing an Enterprise Edition database that is running on a physical server with eight processor cores. The NUP license metric consumes 200 rights because the number of rights that is based on the metric attribute value (25 minimum licenses x 8 CPU cores = 200 rights) is greater than the number of users that are accessing the database (20 users).

Per Processor

The Per Processor license metric licenses the server processors on which you install or run the following Oracle products:

- Oracle Database
- Oracle Database options

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Oracle management packs
- Oracle WebLogic Server
- Oracle Java

Although you can install and run Oracle products on physical servers, virtual servers, partitioned servers, and the cloud, the Per Processor license metric licenses processors only on the underlying physical server or cloud server.

The Per Processor license metric calculates the number of rights that are required for your Oracle products by multiplying the total number of processor cores by a core processor licensing factor, as specified on the Oracle Processor Core Factor Table. Use this license metric in environments where large numbers of users and devices are accessing the same environment or where users aren't easily identifiable and countable, such as the internet.

For example, a physical server that is running an Enterprise Edition database has two processors with four cores each. If your core processor licensing factor is 0.5, the Per Processor license metric consumes four rights for the physical server.

2 CPUs x 4 CPU cores x 0.5 licensing factor = 4 rights.

When you allocate rights for a database using the NUP or Per Processor license metric, Software Asset Management automatically allocates rights for the associated Database options and management packs using the same license metric.

If you create a Client Access License (CAL) record to specify the number of users or devices that can access an Oracle Database or WebLogic Server, the Software Asset Management application licenses users and devices using only the NUP license metric. Software Asset Management doesn't use the Per Processor license metric even if Per Processor licenses are available.

Employee

The Employee license metric licenses the total number of full-time, part-time, and temporary employees, including those employed directly and indirectly through agents, contractors, and consultants, according to Oracle's definition of internal business operations.

The Employee license metric calculates the number of licenses that are required by the total number of employees and not the number of employees that use the Oracle Java SE Universal. The licensing cost is calculated using a tier-based pricing model defined by Oracle. The pricing model is stored in the Price tier [samp_price_tier] table. For more details, see Pricing model for Oracle Java SE Universal.

Additionally, for the Employee license metric, the true-up cost is shown for a subscription period of one year.

When you run reconciliation for a software model that has one or more entitlements with the Employee license metric, a right is consumed for each employee recorded in the resource value records. You can create a resource value record for the Java SE software model keeping the value of units consumed the same as the number of employees consuming the licenses. For details, see Create a resource value record.

When you're using a custom tier table, you can update the override license cost records associated with the Java SE software model. For details, see Create or update an override license cost record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle verified third-party vendor tool

To collect installation and usage data for the Oracle products that are deployed in your environment, you must use a discovery process. With the verification and enrollment of ServiceNow in the Oracle Third-Party Tool Vendor (3PTV) Program, the ServiceNow Discovery application and Software Asset Management application are both verified by Oracle to collect and report on this data without requiring any Oracle measurement tools. You can collect and report on data for Oracle Database, Oracle WebLogic Server, Oracle Fusion Middleware, and the underlying hardware that supports these products.

During contract renewals and audits, Oracle requires you to provide specific usage data for your Oracle products. You can collect this data by running scripts that are provided by Oracle. These scripts collect data about the Oracle products that are deployed in your environment, as well as the physical and virtual hardware that supports those products. However, the process of collecting and reviewing this data can be very time consuming.

The ServiceNow Discovery application uses Oracle-verified Discovery patterns and reporting to collect the same data that is provided in the script output. You can collect this data regularly to track your compliance and minimize unexpected audit results.

For more information on Oracle discovery, see Oracle Global License Advisory Services (GLAS) data collection.

Note: To access all the benefits of ServiceNow Discovery, request and install the CMDB CI Class Models application from the ServiceNow Store. See CMDB CI Class Models store app for more information on this application.

Oracle Database and WebLogic Server licensing in partitioned environments

The Software Asset Management application supports Oracle licensing rules for Oracle Database and WebLogic Server in both soft- and hard-partitioned environments. You can use partitioning to help reduce the number of licenses that are required for your installations.

Oracle Database and WebLogic Server licensing in soft-partitioned environments

The Software Asset Management application supports Oracle Database and WebLogic Server licensing rules in soft-partitioned environments, such as VMware and Nutanix virtualization technology.

Soft partitioning enables you to segment the operating system (OS) of the environment into different OS types and OS versions by using OS resource managers. OS resource managers limit the number of processors that each Oracle database or WebLogic server can run on by creating segments in which CPU resources are allocated to applications within the same OS. For more information about Oracle licensing and soft partitioning, refer to the Oracle Help Center.

When you install or run an Oracle Database or WebLogic Server in soft-partitioned environments, you can license it using either the Named User Plus or Per Processor license metric. In addition, the WebLogic Server licensing support covers the entire WebLogic product family that includes the Standard, Enterprise, and Suite editions. For more information, refer to this knowledge base article KB2630167.

VMware vSphere

VMware vSphere is a virtualization platform through which you can install and run Oracle databases or WebLogic servers on virtual machines (VMs). To run an Oracle database or WebLogic server on a VM, you must license all processors on the underlying physical ESXi host that is running your VM. If your physical ESXi host is running multiple VMs simultaneously,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

you must still license all processors on the host regardless of how many VMs are running the Database or WebLogic server.

Oracle licensing on VMware vSphere is based on the VMware vMotion capability that is associated with each vSphere version. VMware vMotion is the VMware vSphere technology that enables VMs to migrate from one physical ESXi host to another without service interruptions.

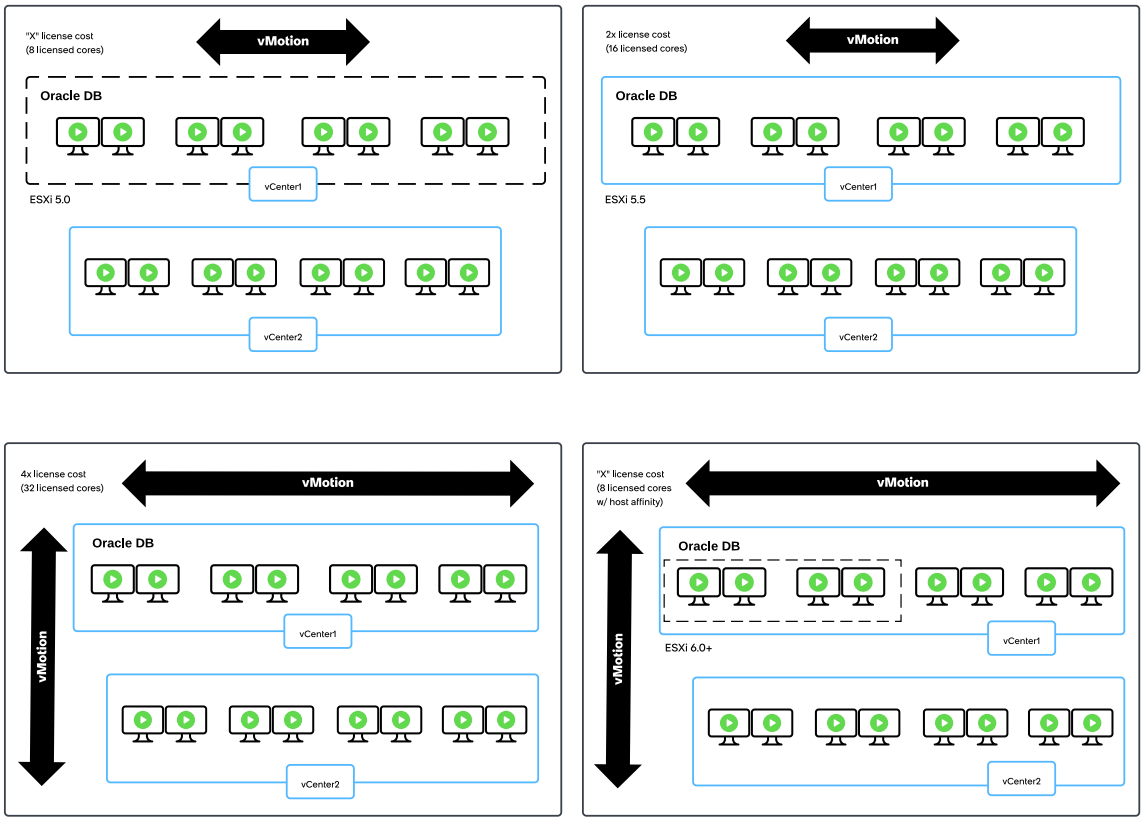
The Oracle publisher pack supports the following Oracle licensing models on VMware vSphere:

Oracle licensing models on VMware vSphere

VMware vSphere version	VMware vMotion capability	Licensing model
VMware vSphere ESXi 5.0 and earlier	VMs can migrate to any physical ESXi host within the same shared storage under the same datacenter.	You must license the processors on all physical ESXi hosts within the same shared storage under the same datacenter.
VMware vSphere ESXi 5.1-5.5	VMs can migrate to any physical ESXi host within the same VMware vCenter Server instance.	You must license the processors on all physical ESXi hosts within the same VMware vCenter Server instance.
VMware vCenter Server 6.0 and later	VMs can migrate to physical ESXi hosts within any VMware vCenter Server instance across your network. Migration is supported only on physical hosts that run VMware vSphere ESXi 5.1 or later on VMware vCenter Server 6.0 and later instances.	You must license the processors on all physical hosts that run VMware vSphere ESXi 5.1 or later within all VMware vCenter Server 6.0 and later instances across your network.

Important: If you enable the **Use host affinity for reconciling licenses for Oracle databases and WebLogic servers on VMware at the vCenter(s) aggregation level** option in your Software Asset Management properties, the Software Asset Management application honors all VM-Host affinity rules when reconciling Oracle licenses within your VMware vCenter Server instances. In this scenario, licensing is based on the sum of all physical ESXi hosts that the VMs can reside on, as specified in your VM-Host affinity rules.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



For more information about Oracle licensing on VMware, see Understanding Oracle Certification, Support and Licensing for VMware Environments.

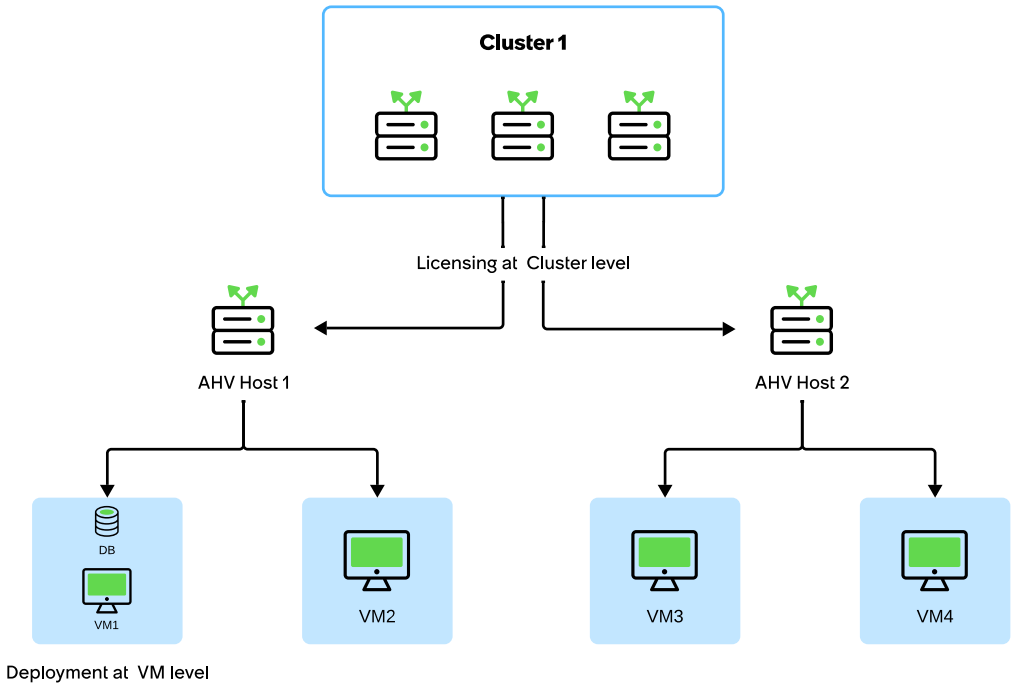
Nutanix Acropolis Hypervisor (AHV)

The AHV is a virtualization platform from Nutanix using which you can install and run Oracle databases and WebLogic servers on Nutanix VMs. According to Oracle's Server Partitioning Policy, only specific technologies, possibly with certain modified configuration constraints, are considered hard partitioning. Nutanix isn't included in Oracle's list of approved hard partitioning technologies. Therefore, to run an Oracle Database on a Nutanix VM, you must license all physical cores on the AHV host running the VM with Oracle Database.

Additionally, if the physical host is part of a Nutanix Cluster, you must license all the physical cores in that cluster. The Oracle publisher pack supports licensing at both the cluster level and the host level, provided there's no Nutanix cluster.

In the following example, the license consumption for deploying a database on Virtual Machine VM1 is calculated at the cluster level. This calculation implies that all physical cores across all hosts in Cluster1 are counted for licensing.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Oracle Database and WebLogic Server licensing in hard-partitioned environments

The Software Asset Management application supports Oracle hard-partitioning licensing rules for IBM AIX Logical Partition (LPAR), Solaris Logical Domain (LDOM), and Solaris Zone.

When you hard partition a server, the server is divided into smaller systems that run independently from each other. Each system contains its own processors, network resources, operating system, memory, and more. For more information on Oracle licensing and hard partitioning, refer to Oracle Partitioning Policy.

When you install or run an Oracle Database or WebLogic Server in hard-partitioned environments, you can license it using either the Named User Plus or Per Processor license metric. In addition, the WebLogic Server licensing support covers the entire WebLogic product family that includes the Standard, Enterprise, and Suite editions. For more information, refer to this knowledge base article KB2630167.

IBM LPAR

LPAR is a defined subset of processor hardware that supports the operating system. An LPAR contains resources, such as processors, memory, and input or output devices, that operate as an independent system. You can have multiple LPARs within each mainframe hardware system.

Discovering the LPARs and LPAR resources within your IBM LPAR infrastructure requires ServiceNow Discovery patterns for the IBM Hardware Management Console (HMC), which is the hardware appliance that enables you to manage and configure your LPARs. To access these discovery patterns, you must request and install the Discovery and Service Mapping Patterns application from the ServiceNow Store. For more information on how to configure a discovery on your LPARs, see IBM Virtualization and Hardware Management Console discovery.

Note: The *lparstat* command pulls a report of LPAR-related information and usage. For more information, see the IBM Knowledge Center.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

When you run a discovery, your discovered LPAR data is populated and stored in the following Configuration Management Database (CMDB) tables on your ServiceNow instance:

- cmdb_ci_ibm_frame
- cmdb_ci_aix_server
- cmdb_ci_lpar_instance
- cmdb_ci_lpar_resource
- cmdb_rel_ci
- cmdb_sam_sw_install

To populate and store this data, you must request and install the CMDB CI Class Models application from the ServiceNow Store. This application adds or updates CMDB classes for the IBM HMC. For more information on IBM HMC CMDB classes, see IBM Hardware Management Console (HMC) extension classes.

After your discovered LPAR data is populated in the appropriate CMDB tables, you can use the *samp_frame_to_lpar_resource* database view to join the tables together and consolidate all LPAR data into a single view. Based on this database view and the Oracle Database and WebLogic Server licensing rules for IBM LPAR, you can identify and determine the license compliance of all Oracle Database and WebLogic server installations across your IBM LPAR infrastructure.

Oracle Database and WebLogic Server licensing rules for IBM LPAR

Processor pool	Description	Licensing rule
Dedicated	Processors are assigned to only one dedicated LPAR, which is an LPAR that is built on dedicated CPU resources.	You must license the dedicated processors on which you install or run an Oracle database or WebLogic server. To determine the number of rights that are required for a dedicated LPAR, multiply the total number of processor cores that are running an Oracle Database or WebLogic server on the LPAR by a core processor licensing factor, as specified on the Oracle Processor Core Factor Table.
Shared	Processors are shared across micro-partitions, which are LPARs that are built on shared CPU resources.	You must license the shared processors on which you install or run an Oracle Database or WebLogic server. You can determine the number of rights that are required across your micro-partitions based on the LPAR type: • **Capped LPAR**: A capped LPAR is a logical partition that is assigned a maximum entitled capacity, which is the number of CPU resources that the LPAR is entitled to receive. Capped LPARs can't use more processor power than the assigned entitled capacity. To determine the number of rights that are required across your capped micro-partitions, multiply the sum of all assigned entitled capacities by a core processor licensing factor, as specified on the Oracle Processor Core Factor Table. • **Uncapped LPAR**: An uncapped LPAR is a logical partition that can use more processor power than the assigned

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database and WebLogic Server licensing rules for IBM LPAR (continued)

Processor pool	Description	Licensing rule
		entitled capacity. Processor power usage is limited by the number of virtual processors that are assigned to the LPAR or by the maximum number of physical processor cores that are available to the shared processor pool. To determine the number of rights that are required across your uncapped micro-partitions, add the sum of all assigned virtual processors with the sum of all assigned entitled capacities. ○ If the resulting value is lower than the number of physical processor cores that are available to the shared processor pool, multiply the value by a core processor licensing factor, as specified on the Oracle Processor Core Factor Table. ○ If the resulting value is greater than the number of physical processor cores that are available to the shared processor pool, multiply the number of physical processor cores by a core processor licensing factor, as specified on the Oracle Processor Core Factor Table.

For more information on database views, see Working with database views for reporting.

Solaris LDOM or Oracle VM Server for SPARC

A logical domain (LDOM) is a distinct logical unit within a single computer system, complete with its own operating system, resources, and identity. You can run different applications in separate logical domains and maintain their independence for performance and security reasons. Solaris LDOM is a virtualization technology that enables creating multiple virtual machines (VMs) on a single physical server.

The ServiceNow Discovery application uses the Solaris LDOM infrastructure pattern and Solaris LDOM shared library pattern to find all LDOM data. For information on Solaris LDOM discovery, see Oracle Solaris LDOM discovery.

The Software Asset Management application supports licensing of Oracle Database and WebLogic Server installed on the Solaris LDOM, version 2.0 and above, for Per Processor and Named User Plus (NUP) license metrics. To license your Oracle Database or WebLogic server installations, rights should be allocated to the physical server that runs the Solaris LDOM configuration. For details on the licensing of Oracle products, see Software model metric attributes.

Solaris zones

You can set up a global zone on a Solaris server and hard partition it with multiple local zones. You can then run an Oracle Database or WebLogic server on one or more local zones. To license your Oracle Database or WebLogic server installations, rights should be allocated to the physical host that runs the entire Solaris zone configuration. For the Per Processor license metric, rights must cover the cores for all local zones up to the maximum capacity of the physical host. For the NUP license metric, rights must cover the clients that access the Database or WebLogic server on the local zones. For information on Solaris zone discovery, see Solaris discovery.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle licensing in cloud environments

The Software Asset Management application supports licensing rules for Oracle Database and WebLogic Server (Standard, Enterprise, and Suite Editions) in cloud environments.

Important: The Software Asset Management application supports Bring Your Own License (BYOL) for Oracle Database and WebLogic Server across hybrid infrastructures. With BYOL support, you can track licenses for your Oracle Database and WebLogic Server in both on-premise and public cloud environments. For more information about Oracle BYOL support, see Bring your own license or subscription to the public cloud.

When you install or run an Oracle Database or WebLogic Server in the cloud, you can license it using either the Named User Plus or Per Processor license metric. In addition, the WebLogic Server licensing support covers the entire WebLogic product family that includes the Standard, Enterprise, and Suite editions. For more information, refer to this knowledge base article KB2630167.

Note: For Oracle WebLogic applications version 12 or later, the software edition won't be discovered. For WebLogic applications, on the Software installation form, manually set the **Edition Override** field to Standard, Enterprise, or Suite.

- The Named User Plus license metric licenses all users and physical devices that access an Oracle cloud database or WebLogic Server.
- The Per Processor license metric licenses the virtual CPUs (vCPUs) on which you install or run an Oracle cloud database or WebLogic Server.

Note: The Oracle Processor Core Factor Table is not applicable in cloud environments.

Amazon Web Services (AWS)

AWS is a cloud computing platform on which you can install and run Oracle databases and WebLogic servers. You can manage your Oracle databases on AWS using either Amazon Elastic Compute Cloud (EC2) or Amazon Relational Database Service (RDS). However, you can manage your Oracle WebLogic servers using only Amazon Elastic Compute Cloud (EC2). For more information on Amazon EC2, refer to the Amazon Elastic Compute Cloud documentation. For more information on Amazon RDS, refer to the Amazon Relational Database Service documentation.

If you enable hyper-threading on your AWS virtual machine instance, the Software Asset Management application provides one Per Processor license for every two vCPUs on which you install or run an Oracle cloud Database or WebLogic Server. If you don’t enable hyper-threading, the Software Asset Management application provides one Per Processor license for every vCPU on which you install or run an Oracle cloud database or WebLogic Server.

For more information on Oracle databases and WebLogic servers in AWS, see Oracle Database on the AWS Cloud: Quick Start Reference Deployment.

Microsoft Azure

Microsoft Azure is a cloud computing platform on which you can create and run Oracle databases and WebLogic servers.

If you enable hyper-threading on your Microsoft Azure virtual machine instance, the Software Asset Management application provides one Per Processor license for every two vCPUs on which you install or run an Oracle cloud database or WebLogic Server. If you don’t enable hyper-threading, the Software Asset Management application provides one Per Processor license for every vCPU on which you install or run an Oracle cloud database or WebLogic Server.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information on Oracle databases and WebLogic servers in Microsoft Azure, see Accelerate your cloud adoption with Microsoft and Oracle.

Oracle Database licensing in multitenant architectures

The Software Asset Management application supports licensing rules for Oracle databases in multitenant architectures.

The Oracle multitenant architecture simplifies database management by enabling you to consolidate multiple pluggable databases (PDBs) into a single container database (CDB). With a CDB, you can track, provision, clone, manage resources for, and upgrade multiple PDBs simultaneously. This multitenant architecture is supported on Oracle Database version 12c Release 1 (12.1) and later.

To run an Oracle database in a multitenant architecture, you must purchase and manage licenses for both Oracle Database and the Oracle Multitenant option. In most cases, Oracle Multitenant option licenses must be purchased and managed separately from Oracle Database licenses. However, Oracle Database Cloud Service Enterprise Edition - High Performance (DBCS EE-HP), Oracle Database Cloud Service Enterprise Edition - Extreme Performance (DBCS EE-EP), and Oracle Database Exadata Cloud Service (ExaCS) do not require a separate license for the Oracle Multitenant option, as it is already included in the database license. For more information on Oracle Database licensing, see Software Asset Management publisher pack for Oracle.

Oracle Multitenant option licensing

The Oracle Multitenant option supports both the Named User Plus and Per Processor license metrics. The Named User Plus license metric licenses all users and physical devices that access a user-created PDB. The Per Processor license metric licenses the processor cores on all physical hosts that are running a user-created PDB. For more information on these license metrics, see Oracle license metrics.

Important: Oracle Multitenant option licensing accounts for user-created PDBs only. It does not account for proxy PDBs or seed PDBs.

You can determine whether Oracle Multitenant option licensing is required for your database deployment based on the following criteria:

- The Oracle Database version and edition of your PDBs and CDBs.
- The number of user-created PDBs within each database instance that is running on the database installation.

Oracle Multitenant option licensing requirements

Oracle Database version	Oracle Database edition	Licensing requirement
12c Release 1 (12.1)	Oracle Database Standard Edition (SE)	The Oracle Multitenant option is not supported.
	Oracle Database Standard Edition One (SE1)	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Multitenant option licensing requirements (continued)

Oracle Database version	Oracle Database edition	Licensing requirement
	Oracle Database Standard Edition 2 (SE2)	
	Oracle Database Enterprise Edition (EE)	• If every database instance contains only one user-created PDB each, licensing is not required since the Oracle Multitenant option is not in use. • If any database instance contains more than one user-created PDB, licensing is required using either the Named User Plus or Per Processor license metric. **Important:** This version and edition of Oracle Database supports up to 252 user-created PDBs per database instance. If a database instance contains more than 252 user-created PDBs, Software Asset Management creates removal candidates for the additional PDBs. You must remove the additional PDBs to maintain compliance.
12c Release 2 (12.2) and 18c	Oracle Database Enterprise Edition (EE)	• If every database instance contains only one user-created PDB each, licensing is not required since the Oracle Multitenant option is not in use. • If any database instance contains more than one user-created PDB, licensing is required using either the Named User Plus or Per Processor license metric. **Important:** This version and edition of Oracle Database supports up to 252 user-created PDBs per database instance. If a database instance contains more than 252 user-created PDBs, Software Asset Management creates removal candidates for the additional PDBs. You must remove the additional PDBs to maintain compliance.
	Oracle Database Standard Edition 2 (SE2)	The Oracle Multitenant option is supported only in deployments where every database instance contains one user-created PDB each. However, licensing is not required since the Oracle Multitenant option is not in use.
	Oracle Database Cloud Service Enterprise Edition - High Performance (DBCS EE-HP)	• If every database instance contains one user-created PDB each, licensing is not required since the Oracle Multitenant option is not in use. • If any database instance contains more than one user-created PDB, the Oracle Multitenant option is in use. However, separate

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Multitenant option licensing requirements (continued)

Oracle Database version	Oracle Database edition	Licensing requirement
	Oracle Database Cloud Service Enterprise Edition - Extreme Performance (DBCS EE-EP)	licensing is not required for this option since it is already included in the Oracle Database license. **Important:** These versions and editions of Oracle Database support up to 4,096 user-created PDBs per database instance. If a database instance contains more than 4,096 user-created PDBs, Software Asset Management creates removal candidates for the additional PDBs. You must remove the additional PDBs to maintain compliance.
	Oracle Database Exadata Cloud Service (ExaCS)	
19c and later	Oracle Database Enterprise Edition (EE)	• If every database instance contains three or less user-created PDBs each, licensing is not required since the Oracle Multitenant option is not in use. • If any database instance contains more than three user-created PDBs, licensing is required using either the Named User Plus or Per Processor license metric. **Important:** This version and edition of Oracle Database supports up to 252 user-created PDBs per database instance. If a database instance contains more than 252 user-created PDBs, Software Asset Management creates removal candidates for the additional PDBs. You must remove the additional PDBs to maintain compliance.
	Oracle Database Standard Edition 2 (SE2)	The Oracle Multitenant option is supported only in deployments where every database instance contains three or less user-created PDBs each. However, licensing is not required since the Oracle Multitenant option is not in use.
	Oracle Database Cloud Service Enterprise Edition - High Performance (DBCS EE-HP)	• If every database instance contains three or less user-created PDBs each, licensing is not required since the Oracle Multitenant option is not in use. • If any database instance contains more than three user-created PDBs, the Oracle Multitenant option is in use. However, separate

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Multitenant option licensing requirements (continued)

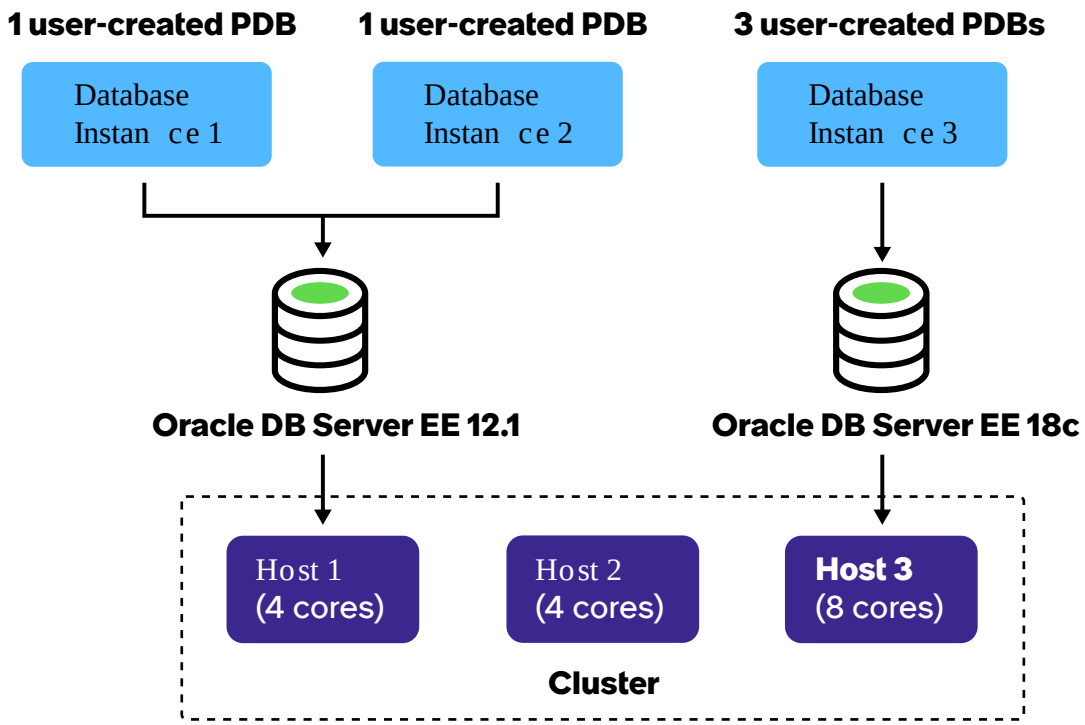
Oracle Database version	Oracle Database edition	Licensing requirement
	Oracle Database Cloud Service Enterprise Edition - Extreme Performance (DBCS EE-EP)	licensing is not required for this option since it is already included in the Oracle Database license. **Important:** These versions and editions of Oracle Database support up to 4,096 user-created PDBs per database instance. If a database instance contains more than 4,096 user-created PDBs, Software Asset Management creates removal candidates for the additional PDBs. You must remove the additional PDBs to maintain compliance.
	Oracle Database Exadata Cloud Service (ExaCS)	

Oracle Multitenant option use cases

You can view the following use cases to better understand licensing requirements for the Oracle Multitenant option.

The Oracle Multitenant option is not in use

Oracle Multitenant option not in use example



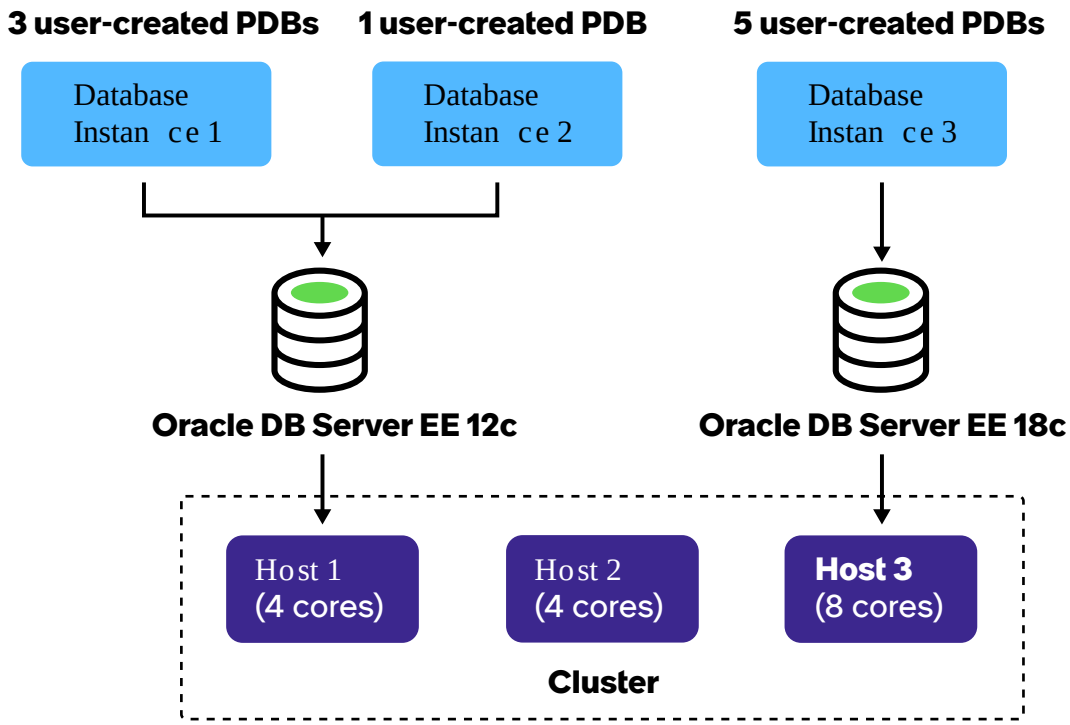
In this scenario, Database Instance 1 and Database Instance 2 are running Oracle Database 12.1 Enterprise Edition and contain one user-created PDB each. Database Instance 3 is running Oracle Database 18c Enterprise Edition and also contains one user-created PDB. Since none of the database instances meet or exceed the minimum number of user-created PDBs for which the Oracle Multitenant option is required, the option is not in use on any of the database instances.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Additional licensing for the Oracle Multitenant option is not required on any hosts within the cluster.

The Oracle Multitenant option is in use

Oracle Multitenant option in use example

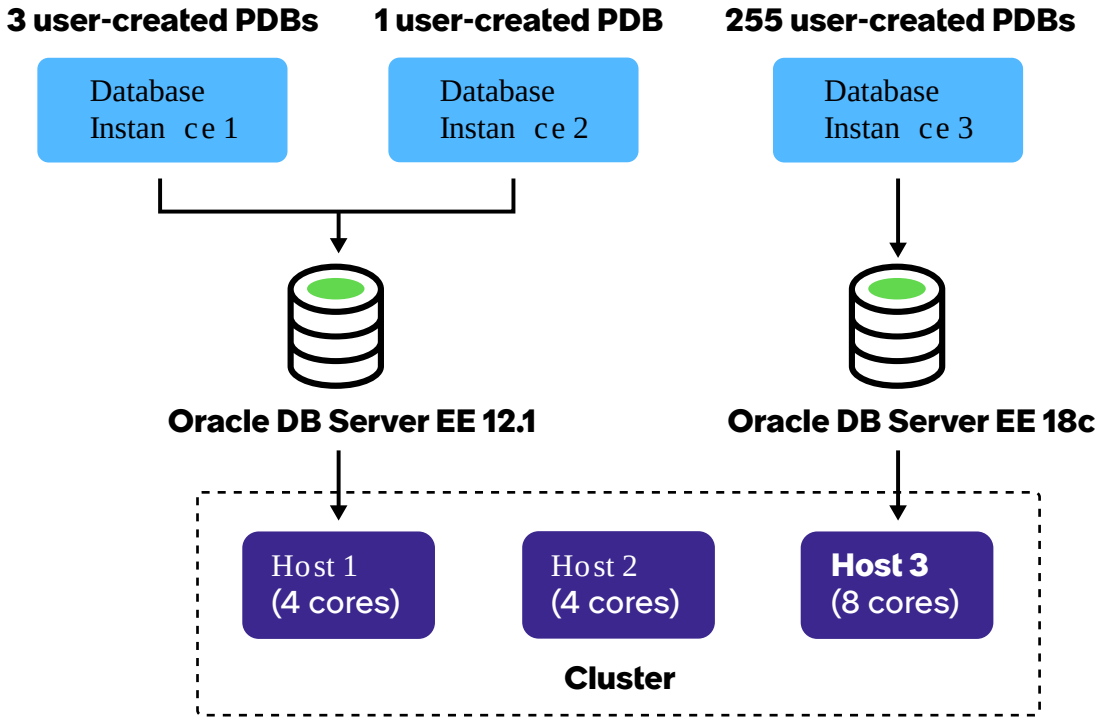


In this scenario, Database Instance 1 and Database Instance 2 are running Oracle Database 12.1 Enterprise Edition. Database Instance 1 contains three user-created PDBs, while Database Instance 2 contains one user-created PDB. Database Instance 3 is running Oracle Database 18c Enterprise Edition and contains five user-created PDBs. Since both Database Instance 1 and Database Instance 3 exceed the minimum number of user-created PDBs for which the Oracle Multitenant option is required, the option is in use on both database instances. Additional licensing for the Oracle Multitenant option is required on all hosts within the cluster.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Oracle Multitenant option is in use but exceeds the maximum PDB amount

Oracle Multitenant option in use but exceedx maximum PDB amount example



In this scenario, Database Instance 1 and Database Instance 2 are running Oracle Database 12.1 Enterprise Edition. Database Instance 1 contains three user-created PDBs, while Database Instance 2 contains one user-created PDB. Database Instance 3 is running Oracle Database 18c Enterprise Edition and contains 255 user-created PDBs. Since both Database Instance 1 and Database Instance 3 exceed the minimum number of user-created PDBs for which the Oracle Multitenant option is required, the option is in use on both database instances. Additional licensing for the Oracle Multitenant option is required on all hosts within the cluster.

However, Database Instance 3 is considered to be out of compliance. Based on licensing rules for the Oracle Multitenant option, the maximum number of user-created PDBs that are supported on database instances running Oracle Database 18c Enterprise Edition is 252. Since Database Instance 3 contains 255 user-created PDBs, Software Asset Management creates removal candidates for the three additional user-created PDBs. These additional PDBs must be removed to maintain compliance.

Oracle Database licensing for Standard Editions

Oracle Database Standard Editions are licensed on servers having a value less than the maximum capacity of sockets to help ensure risk-free license compliance.

Sockets are slots on which processors or CPUs are placed. You must manually enter socket information under the non-discoverable field **Socket count** in the **cmdb_hardware_product_model** hardware model table. ITOM Discovery discovers only the occupied slots and Software Asset Management reconciles and provides compliance.

Oracle Database Standard Edition licensing rules

Edition	Max rule for NUP and processor
Oracle DB Standard Edition	4 sockets per server

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database Standard Edition licensing rules (continued)

Edition	Max rule for NUP and processor
Oracle DB Standard Edition 1	2 sockets per server
Oracle DB Standard Edition 2	2 sockets per server

Example: Oracle Standard Edition 2 deployed on a server with more than 2 sockets

The following example shows the message that would appear for a reclamation or removal candidate that doesn't follow the licensing rules.

```
Oracle Database Standard Edition 2 installed on <Server Name> has
been flagged as an unlicensed install. As per Oracle Licensing
Policy, Oracle Database Standard Edition 2 may only be licensed
on servers that have a maximum capacity of 2 sockets. This Server
is found to have <no. of socket> number of sockets available. You
are advised to uninstall the Oracle Database Standard Edition 2
from this server or upgrade to Oracle DB Enterprise Edition. We
suggest working with your Oracle Database Administrator to assess
the impact before proceeding with this action. Please note that
the maximum number of sockets or slots available on a server are
part of the hardware specification. Hence it is advised to update
this information on the hardware product model <hw model name>.
If this information is not present on the hardware model, it is
assumed that all sockets are occupied and discovered.
```

Oracle Database options and management packs

You can use the Software Asset Management publisher pack for Oracle to track licensing positions for your Oracle Database options and management packs. The Licensable Oracle Options [samp_oracle_option_set] table provides the complete list of database options and management packs that you can create software models for.

You must manage licensing for your Oracle Database options and management packs separately from your Oracle Database. Separate software models and entitlements are required for each of your database servers, database options, and management packs, thereby providing a more comprehensive view of your Oracle license compliance position.

For example, Oracle Database 12c R1 Enterprise with the Partitioning option requires two separate software models and entitlements.

Oracle DB licensing example

Purpose	Software model	Software entitlement
Track licensing for Oracle Database 12c R1 Enterprise.	Oracle Database 12c R1 Enterprise No value selected for the **Database option** field.	Record your purchased rights for Oracle Database 12c R1 Enterprise.
Track licensing for the Partitioning option.	Oracle Database 12c R1 Enterprise Partitioning	Record your purchased rights for the Partitioning option.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle DB licensing example (continued)

Purpose	Software model	Software entitlement
	Partitioning selected for the **Database option** field.	

To track and measure usage for your Oracle Database options and management packs, request and install the Data Collection for Oracle Global Licensing and Advisory Services application from the ServiceNow Store. See Request Data Collection for Oracle Global Licensing and Advisory Services (GLAS) for detailed instructions.

Important: If you are activating the Software Asset Management application for the first time in the San Diego and later releases, the Data Collection for Oracle Global Licensing and Advisory Services application is required for discovering and measuring the usage of your database options and management packs.

If you are activating the Software Asset Management application for the first time in the Rome and earlier releases or you are upgrading an existing instance of the Software Asset Management application from the Rome and earlier releases to the San Diego and later releases, you can continue using the existing patterns for discovering and measuring the usage of your database options and management packs. However, ServiceNow recommends that you use the Data Collection for Oracle Global Licensing and Advisory Services application instead, as the application provides enhanced capabilities that address additional use cases.

After you install the application, the SAM - Evaluate database option usage from Oracle GLAS data scheduled job runs weekly or on-demand to retrieve usage data for both the Oracle database options and management packs that are installed in your Oracle environment and the Oracle features that are associated with them. The Software Asset Management application can then include this data in the Oracle reconciliation process to help you determine the license compliance positions of your database options and management packs, which are reported separately from the license compliance positions of your Oracle Database.

Note: For more information on how usage data for your Oracle features can help you determine the license compliance of your database options and management packs, see Feature mapping for Oracle Database options and management packs.

Oracle Database options and management packs follow the Oracle Database lifecycle and are displayed in the License usage view (Software Asset Workspace) or License Workbench (Software Asset Management classic application). However, the following remediation options are not available for database options and management packs:

- Remove Unallocated Installs
- Remove Unlicensed Installs

Supported Oracle Database options and management packs

The Software Asset Management publisher pack for Oracle supports the following database options and management packs based on whether you are using the existing discovery and usage measurement patterns or the Data Collection for Oracle Global Licensing and Advisory Services application to track and measure usage for your database options and management packs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database option or management pack	Supported by existing discovery and usage measurement patterns	Supported by the Data Collection for Oracle Global Licensing and Advisory Services application
Active Data Guard	Yes	Yes
Advanced Compression	Yes	Yes
Advanced Security	Yes	Yes
Change Management Pack **Note:** If your database is running Oracle Database 12c or later, the Change Management Pack, Configuration Management Pack for Oracle Database, and Provisioning and Patch Automation Pack for Database are consolidated into the Oracle Database Lifecycle Management Pack for Oracle Database. To use the Change Management Pack, you must license the Oracle Database Lifecycle Management Pack for Oracle Database.	Yes	Yes
Configuration Management Pack for Oracle Database **Note:** If your database is running Oracle Database 12c or later, the Change Management Pack, Configuration Management Pack for Oracle Database, and Provisioning and Patch Automation Pack for Database are consolidated into the Oracle Database Lifecycle Management Pack for Oracle Database. To use the Configuration Management Pack for Oracle Database, you must license the Oracle Database Lifecycle Management Pack for Oracle Database.	Yes	Yes
Content Database Suite **Note:** Content Database Suite is available only on databases that are running Oracle Database 11g Release 1 and earlier.	No	Yes
Data Masking Pack	Yes	No

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database option or management pack	Supported by existing discovery and usage measurement patterns	Supported by the Data Collection for Oracle Global Licensing and Advisory Services application
		Note: If you are using the Data Collection for Oracle Global Licensing and Advisory Services application, you can track and measure usage for Oracle Data Masking and Sub-setting Pack instead.
Data Mining **Note:** Data Mining requires separate licensing only if your database is running Oracle Database 11g Release 1 or earlier. If your database is running Oracle Database 11g Release 2 or later, Data Mining is already included in the database license.	No	Yes
Database In-Memory	Yes	Yes
Database Vault	Yes	Yes
Diagnostics Pack	Yes	Yes
Label Security	Yes	Yes
Multitenant	Yes	Yes
OLAP	Yes	Yes
Oracle Cloud Management Pack for Oracle Database	No	Yes
Oracle Data Masking and Sub-setting Pack	No	Yes

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database option or management pack	Supported by existing discovery and usage measurement patterns	Supported by the Data Collection for Oracle Global Licensing and Advisory Services application
	Note: If you are using the existing discovery and usage measurement patterns for your database options and management packs, you can track and measure usage for Data Masking Pack instead.	
Oracle Database Lifecycle Management Pack for Oracle Database **Note:** If your database is running Oracle Database 12c or later, the Change Management Pack, Configuration Management Pack for Oracle Database, and Provisioning and Patch Automation Pack for Database are consolidated into the Oracle Database Lifecycle Management Pack for Oracle Database. You can access all three packs by licensing only the Oracle Database Lifecycle Management Pack for Oracle Database.	No	Yes
Oracle Spatial and Graph	No	Yes

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database option or management pack	Supported by existing discovery and usage measurement patterns	Supported by the Data Collection for Oracle Global Licensing and Advisory Services application
Note: Oracle Spatial and Graph requires separate licensing only if your database is running Oracle Database 11g Release 1 or earlier. If your database is running Oracle Database 11g Release 2 or later, Oracle Spatial and Graph is already included in the database license.	**Note:** If you are using the existing discovery and usage measurement patterns for your database options and management packs, you can track and measure usage for Spatial and Graph instead.	
Partitioning	Yes	Yes
Provisioning and Patch Automation Pack for Database **Note:** If your database is running Oracle Database 12c or later, the Change Management Pack, Configuration Management Pack for Oracle Database, and Provisioning and Patch Automation Pack for Database are consolidated into the Oracle Database Lifecycle Management Pack for Oracle Database. To use the Provisioning and Patch Automation Pack for Database, you must license the Oracle Database Lifecycle Management Pack for Oracle Database.	Yes	Yes
Real Application Clusters	Yes	Yes
Real Application Clusters One Node	Yes	Yes
Real Application Testing	Yes	Yes
Records Database **Note:** Records Database is available only on databases that are running Oracle Database 10g Release 2 or earlier.	No	Yes
Spatial and Graph	Yes	No

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database option or management pack	Supported by existing discovery and usage measurement patterns	Supported by the Data Collection for Oracle Global Licensing and Advisory Services application
Note: Spatial and Graph requires separate licensing only if your database is running Oracle Database 11g Release 1 or earlier. If your database is running Oracle Database 11g Release 2 or later, Spatial and Graph is already included in the database license.		**Note:** If you are using the Data Collection for Oracle Global Licensing and Advisory Services application, you can track and measure usage for Oracle Spatial and Graph instead.
Total Recall **Note:** Total Recall is available only on databases that are running Oracle Database 11g and earlier.	No	Yes
Tuning Pack **Note:** Tuning Pack is supported only on databases that are running Oracle Database Enterprise Edition. If Tuning Pack is discovered on any database that is running Oracle Database Standard Edition or Express Edition, the Software Asset Management application generates a removal candidate for that Tuning Pack installation. To maintain compliance with Oracle, you must either uninstall Tuning Pack from the database or upgrade the database to Oracle Databse Enterprise Edition.	Yes	Yes

Request Data Collection for Oracle Global Licensing and Advisory Services (GLAS)

Request the Data Collection for Oracle GLAS application from the ServiceNow Store so that you can track and measure usage for your Oracle Database options and management packs.

Before you begin
Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From a web browser, go to the ServiceNow Store.
2. Log in using your HI credentials.
3. In the search bar, enter `Data Collection for Oracle Global Licensing and Advisory Services` and then select **Search**.
4. Select the result called Data Collection for Oracle Global Licensing and Advisory Services.
5. On the Data Collection for Oracle Global Licensing and Advisory Services page, select **Request Install**.
   The ServiceNow Request for App Installation - Data Collection for Oracle Global Licensing and Advisory Services dialog box opens.
6. In the dialog box, fill in the fields.

ServiceNow Request for App Installation - Data Collection for Oracle Global Licensing and Advisory Services dialog box

Field	Description
Instance Name	Name of the instance on which you want to install the application. After you enter the instance name, select **Validate Instance** to verify that the instance exists.
Reason for request	Reason for requesting the application.

7. Select **Request**.
8. Select **Close**.

Result
If your request is approved, you will receive an email with detailed instructions on how to install the application.

What to do next
Install the application according to the instructions in the email.

Note:

The Data Collection for Oracle GLAS application includes two configurations, V1 and V2, which are managed by a system property. V1 is set as the default, while V2 serves as an alternative optimized for larger or high-volume Oracle database environments. Both configurations provide the same data collection features. For more information on enabling V2, see Enable the Oracle GLAS V2 data collection method.

Related topics

Oracle GLAS data collection using patterns

Enable the Oracle GLAS V2 data collection method

Download Oracle Global License Advisory Services (GLAS) data

Feature mapping for Oracle Database options and management packs

The Software Asset Management application automatically maps discovered Oracle features to the Oracle Database options and management packs that they're associated with. These mappings can help you determine the usage and license compliance of your database options and management packs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Every Oracle Database option and management pack contains a set of features that enhance the capabilities of the Oracle Database. For example, the Oracle Active Data Guard option provides real-time data protection and availability for Oracle Database using features such as automatic block repair, global data services, and application continuity. For more information on the features that are supported by each database option and management pack, refer to the Oracle documentation.

When you run a discovery, the ServiceNow® Discovery application locates and identifies both the database options and management packs that are installed in your Oracle environment and the features that are associated with them. This data is then sent to the Software Asset Management application, where it can be normalized and reconciled.

After the data is normalized, the Software Asset Management application uses the Oracle Feature Option Mapping [samp_feature_option_mapping] table to map your features to the appropriate database options and management packs at the database instance level. Any subsequent usage data that you retrieve for each feature via the SAM - Evaluate database option usage from Oracle GLAS data scheduled job can then be applied to the mapped database options and management packs. The Software Asset Management application uses this data with predefined database option and management pack usage rules to determine which database options and management packs are being used on each database instance. The resulting usage information is included in the Oracle reconciliation process to help you determine the license compliance of your database options and management packs.

Update the default mapping for a feature

If a discovered feature is associated with more than one Oracle Database option or management pack, you can change the database option or management pack that the feature usage data is applied to by updating the default mapping for that feature.

Before you begin

Role required: admin

About this task

Oracle features can be associated with multiple database options and management packs. However, the Software Asset Management application can map each feature to only one database option or management pack at a time.

The Software Asset Management application automatically maps each discovered feature to an appropriate database option or management pack based on default mappings that have been predefined for each feature. Usage data for each feature can then be applied to the mapped database options and management packs to help you determine if they are in use.

If any of your discovered features are associated with more than one database option or management pack, you can update the default mappings for those features based on how you are using each feature and what entitlements you have purchased for the associated database options and management packs. By updating the default mappings for those features, you can change the database options and management packs that the corresponding feature usage data is applied to, thereby enabling you to better optimize the license compliance positions of your database options and management packs based on your organization's needs.

Note: You can update the default mappings only for features that are associated with multiple database options and management packs.

Procedure

1. On the page header of your ServiceNow instance, select **All**.
2. In the menu navigation filter, enter `samp_option_for_feature_inuse.list`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Default option for feature in use list opens. This list displays the default mappings for all discovered features that are currently in use and can be mapped to more than one database option or management pack.

3. From the list of available features, select the feature that you want to change the default mapping for.
4. From the **Default database option in use** drop-down on the Default option for feature in use form, select the database option or management pack that you want to map the feature to.

   Note: The **Default database option in use** drop-down is automatically filtered to display only the database options and management packs that the selected feature is associated with.

5. Select **Update**.
   You automatically return to the Default option for feature in use list, which displays the new default mapping.

What to do next

To activate the new default mapping, you must run the SAM - Evaluate database option usage from Oracle GLAS data scheduled job. You can either run the job on-demand or wait for the next scheduled job. After the job completes successfully, usage data for the specified feature can then be applied to the newly mapped database option or management pack.

Unreported Database Options Usage report

You can use the Unreported Database Options Usage report to gain visibility into the Oracle Database options and management packs that are being used on undiscovered database instances. Although you cannot track usage for these database options and management packs, this report can help you determine any potential licensing implications that are associated with them.

Note: This report is available only in the Software Asset Management classic application.

To view this report, navigate to **All** > **Reports** > **View/Run**. From the list of available reports, search for and select **Unreported Database Options Usage**. When the corresponding Edit report page opens, select **Run**.

Oracle Unreported Database Options Usage report

Field	Description
Database name	Undiscovered database instance on which the database option or management pack is being used.
Database option	Database option or management pack that is being used on the undiscovered database instance.
Host	Physical host on which the undiscovered database instance is running.
Server	Server on which the physical host is running.

Oracle reconciliation

Oracle reconciliation keeps your Oracle license positions accurate and up-to-date without requiring manual calculations. Reconciliation runs weekly or on-demand.

When you run an Oracle reconciliation, Software Asset Management determines the **Rights Used By** and **Rights Needed By** allocations for the named users, physical devices, and physical

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

hosts that are accessing or running an Oracle product. You can use this information to keep your Oracle products in conformance.

Note: Any allocations that you make on a physical host are considered valid. Software Asset Management marks these allocations as **Allocated in use** in the license workbench. Any allocations that you make on a virtual host, such as a virtual machine (VM), are considered invalid. Software Asset Management marks these allocations as **Allocated not in use**.

For Oracle database and WebLogic server licensing on VMware virtualization technology, you can select the level of aggregation for your reconciliation calculation using the *`Select the level of aggregation for reconciling licenses for Oracle databases and WebLogic servers on VMware`* property. You can also enable Software Asset Management to account for VM-Host affinity rules during Oracle reconciliation using the *`Use host affinity for reconciling licenses for Oracle databases and WebLogic servers on VMware at the vCenter(s) aggregation level`* property. See Software Asset Management properties for information on these properties.

Set up domain-specific reconciliation properties for Oracle

Use domain separation application properties for Software Asset Management to set up Oracle reconciliation properties for specific domains.

Before you begin

To set up domain separation application properties for Software Asset Management, you must activate the Domain Support - Domain Extensions Installer (com.glide.domain.msp_extensions.installer) plugin on your ServiceNow instance.

Role required: sam_admin

About this task

Domain separation application properties are available for the Software Asset Management application. These properties correspond directly to the existing Software Asset Management properties and enable you to specify the domain that you want each property to apply to.

Domain separation is supported on the following Oracle reconciliation properties:

- **Select the level of aggregation for reconciling licenses for Oracle databases and WebLogic servers on VMware** (*`com.snc.samp.oracle.reconlevel`*)
- **Use host affinity for reconciling licenses for Oracle databases and WebLogic servers on VMware at the vCenter(s) aggregation level** (*`com.snc.samp.oracle.hostaffinityenabled`*)

For more information on the existing Software Asset Management properties, see Software Asset Management properties. For more information on domain separation application properties, see Domain separation application properties.

Procedure

1. From your ServiceNow® instance, navigate to **All** > **Software Asset Management** > **Administration** > **Application Properties**.
2. From the list of available application properties, select the application property that you want to modify.
3. In the Application Property Values related list, select the application property value that you want to modify.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you do not have any existing application property values or you want to add additional application property values, select **New**.

4. On the form, fill in the fields.

Application Property Values form

Field	Description
Application Property	Name of the application property that the application property value applies to. This field populates automatically.
Value	Value of the application property. This value must be equivalent to one of the available values in the corresponding Software Asset Management property. For example, you can set the value of the *com.snc.samp.oracle.reconlevel* application property to `esx`, `cluster`, or `vcenter`. See Software Asset Management properties for more details on the available values in the Software Asset Management properties.
Domain	Domain that you want the application property value to apply to.

5. Depending on whether you are updating an existing application property value or adding a new application property value, select either **Update** or **Submit**.
If you are updating an existing application property value, select **Update**. If you are adding a new application property value, select **Submit**.

Oracle Infrastructure report

You can use the Oracle Infrastructure report to gain visibility into your Oracle infrastructure. This report includes information about the Oracle databases and WebLogic Server editions that you're running and the configuration items that are supporting them.

Note: The Oracle infrastructure report is domain separated.

You can view the Oracle Infrastructure report in both the Software Asset Management classic application and the Software Asset Workspace.

To view this report in the Software Asset Management classic application, navigate to **All** > **Reports** > **View/Run** on your ServiceNow instance. At the top of the Reports page, select **All**. From the list of all available reports, locate and select **Oracle infrastructure report**.

To view this report in the Software Asset Workspace, navigate to **Workspaces** > **Software Asset Workspace** on your ServiceNow instance. After the Software Asset Workspace launches, navigate to **License usage** > **Reports** > **Oracle infrastructure report**.

Oracle Infrastructure Report

Column	Description
Required by (Device)	Configuration item, such as a server, cluster, vCenter, or datacenter, on which the Oracle database, Database option, management pack, or WebLogic Server is installed. Select an entry to view additional information about the licensing requirements for that configuration item. See Licenses Required By form for more details.
Database option	Database option or management pack that is being used with the Oracle database.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Infrastructure Report (continued)

Column	Description
Version	Oracle Database or WebLogic Server version that is installed on your configuration item.
Edition	Oracle Database or WebLogic Server edition that is installed on your configuration item.
Software model	Software model that is associated with the Oracle database, database option, management pack, or WebLogic Server.
License metric result	License metric that the Oracle license is counted against when reconciliation runs. The options are **Named User Plus** and **Per Processor**.
Licenses required	Number of rights that are required for license compliance.
Model ID	Model ID of the configuration item on which the Oracle database, database option, management pack, or WebLogic Server is installed.
CPU manufacturer	Manufacturer of the CPU that is used by the configuration item.
CPU type	Type of CPU that is used by the configuration item.
CPU count	Number of CPUs within the configuration item.
CPU core count	Number of cores within each CPU.
CPU core thread	Number of threads that divide each core within a CPU.
Oracle core factor	Oracle processor core factor that is used to determine the number of required rights.
CPU speed (MHz)	Clock speed (in megahertz) of the CPU that is used by the configuration item.
Purchased	Number of rights that you have purchased.
Operating System	Operating system of the configuration item on which the Oracle database, database option, management pack, or WebLogic Server is installed.
Socket Count	Number of slots available on the motherboard.

Licenses Required By form

To view additional information about the licensing requirements for a specific configuration item, select the configuration item from the **Required by (Device)** field of the Oracle Infrastructure report. The corresponding Licenses Required By form opens, where you can view information about the license consumption, Oracle Database and WebLogic Server software installations, Oracle Database options and management packs, database, and WebLogic Server instances that are associated with the selected configuration item.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licenses Required By form

Field	Description
Required by	Configuration item, such as a server, cluster, vCenter, or datacenter, on which the Oracle database, database option, management pack, or WebLogic Server is installed.
License metric result	License metric that the Oracle license is counted against when reconciliation runs. The options are **Named User Plus** and **Per Processor**.
Licenses required	Number of rights that are required for license compliance.
Licensing status	Licensing status of the Oracle database, database option, management pack, or WebLogic Server.
License Consumption Details related list	
Required by	Configuration item that the Oracle database, database option, management pack, or WebLogic Server is installed on.
Model ID	Model ID of the configuration item.
Processor name	Name of the processors that are running on the configuration item.
Processors	Number of processors that are running on the configuration item.
Cores	Total number of cores within the configuration item.
CPU count	Number of CPUs within the configuration item.
CPU core count	Number of cores within each CPU.
CPU core thread	Number of threads that divide each core within a CPU.
Core Factor	Oracle processor core factor that is used to determine the number of required rights.
Licenses required	Number of rights that are required for license compliance.
CPU speed (MHz)	Clock speed (in megahertz) of the CPU that is used by the configuration item.
Purchased	Number of rights that you have purchased.
Operating System	Operating system of the configuration item.
Options related list **Note:** This related list appears only when the software model for the required license is associated with an Oracle Database option or management pack.	
Instance	Database instance that accesses and manages data that is related to your Oracle Database option or management pack.
Option	Oracle Database option or management pack that is installed on your configuration item.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licenses Required By form (continued)

Field	Description
Licensable	Value that indicates whether the Oracle Database option or management pack is licensable. If the option or management pack is licensable, the value is automatically set to **true**. If the option or management pack isn't licensable, the value is automatically set to **false**.
Currently used	Value that indicates whether the Oracle Database option or management pack has current or past usage. If the option or management pack has any current or past usage, the value is automatically set to **In Use**. If the option or management pack doesn't have any current or past usage, the value is automatically set to **Not In Use**.
First usage date	Date on which you first started using the Oracle Database option or management pack.
Last usage date	Date on which you last used the Oracle Database option or management pack.
Installs related list **Note:** This related list appears only when the software model for the required license is associated with an Oracle Database or WebLogic Server software installation.	
Display name	Name of the Oracle Database or WebLogic Server software installation.
Publisher	Publisher of the installed software. This field is set to **Oracle**.
Version	Oracle Database or WebLogic Server version that is installed on your configuration item.
Discovery model	Discovery model that is associated with the Oracle Database or WebLogic Server software installation.
Installed on	Configuration item that the Oracle Database or WebLogic Server software is installed on.
Assigned to	User that is associated with the Oracle Database or WebLogic Server software installation.
Instances related list **Note:** This related list appears only when the software model for the required license is associated with an Oracle Database or WebLogic Server software installation.	
Name	Name of the instance that accesses and manages the data in your Oracle database or WebLogic Server.
Environment	Environment that the database or WebLogic Server instance resides in.
Version	Version of the database or WebLogic Server that the instance accesses and manages.
Vendor	Vendor of the database or WebLogic Server that the instance accesses and manages. This field is set to **Oracle**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database Deployments per Agreement report

You can use the Oracle Database Deployments per Agreement report to gain visibility into your Oracle Database deployments across hybrid infrastructures, based on the agreement type.

Note: The Oracle Database Deployments per Agreement report is available only in the Software Asset Workspace. This report is not available in the Software Asset Management classic application.

To view this report, launch the Software Asset Workspace by navigating to **Workspaces** > **Software Asset Workspace** on your ServiceNow instance. From the Software Asset Workspace, navigate to **License usage** > **Reports** > **Oracle Database deployments per agreement**.

Oracle Database Deployments per Agreement report

Field	Description
Name	Name of the Oracle Database deployment.
Product	Oracle product that is running within your deployment. This field is always set to **Database**.
Version	Oracle Database version that is installed or running on your servers.
Edition	Oracle Database edition that is installed or running on your servers.
License metric	License metric that the Oracle Database license is counted against when reconciliation runs. The options are **Named User Plus** and **Per Processor**.
Agreement type	Agreement type for your Oracle Database deployment. The options are **ULA** (Unlimited License Agreement) and **Generic**.
Cloud provider	Cloud provider through which your Oracle Database is deployed.
Cloud service type	Cloud service model through which your Oracle Database is deployed. The options are **PaaS** and **IaaS**.

Software Publisher Analytics dashboard for Oracle in Software Asset Management classic

View compliance analysis results related to Oracle on the Software Publisher Analytics dashboard in the Software Asset Management classic application.

Access the Software Publisher Analytics dashboard by navigating to **All** > **Software Asset** > **Publisher Overview**.

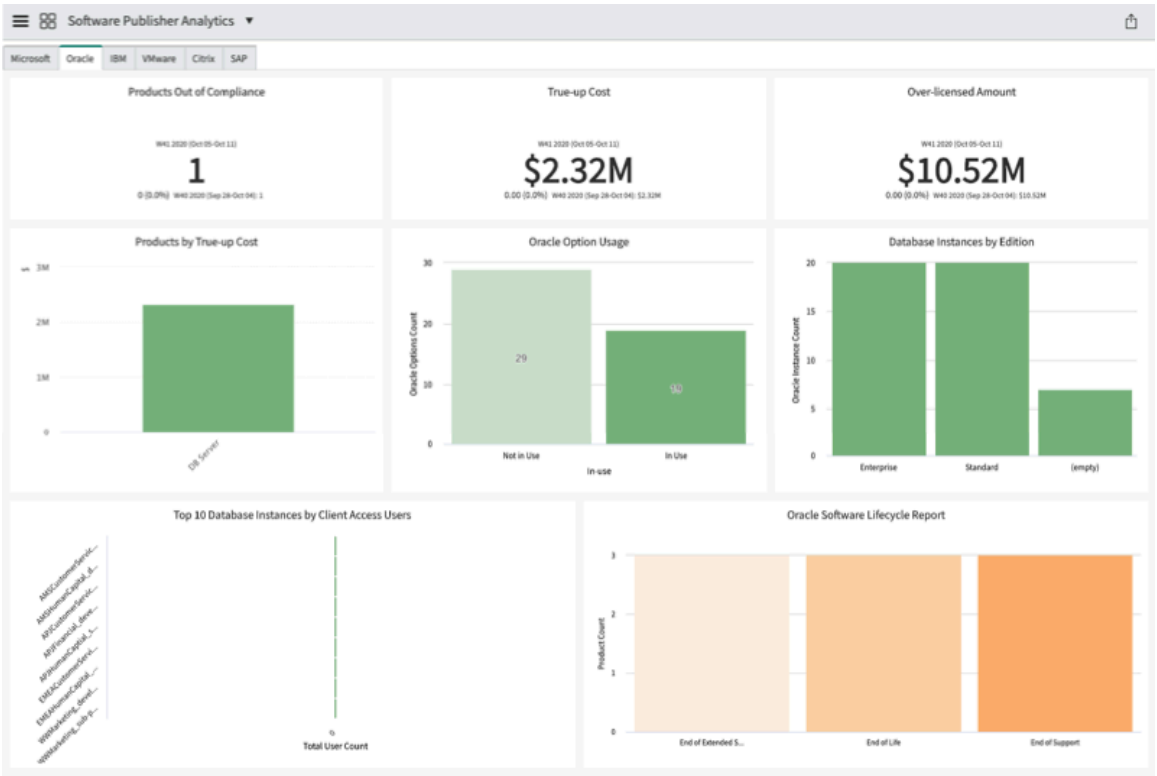
Note: The add-on Oracle publisher pack (com.snc.samp.oracle) plugin must be installed to view the Oracle dashboard tab.

Results are updated whenever a new reconciliation result is available. You can save charts in PNG or JPG format.

Oracle dashboard

You can manage Oracle Server Software, such as Database Server, using the Oracle publisher pack.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Oracle tab

Report	Source list	Description
Products out of Compliance	Product Results	Number of products that have at least one software model out of compliance. Select the report to view the results in the License Workbench.
True-up Cost	Product Results	Cost to be compliant based on the average prices for entitlements for the rights.
Over-Licensed Amount	Product Results	Cost of licenses owned but not being used.
Products by True-up Cost	Product Results	Greatest true-up costs by product.
Oracle Options Usage	Oracle Options	Installed Oracle licenses versus licenses in use (true versus false).
Database Instances by Edition	Oracle Instances	Total number of database instances by database edition.
Top 10 Database Instances by Client Access Users	Client Access	Database instances with the greatest number of client access users.
Oracle Software Lifecycle Report	Software Lifecycle Report	Number of products in each software lifecycle phase,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle tab (continued)

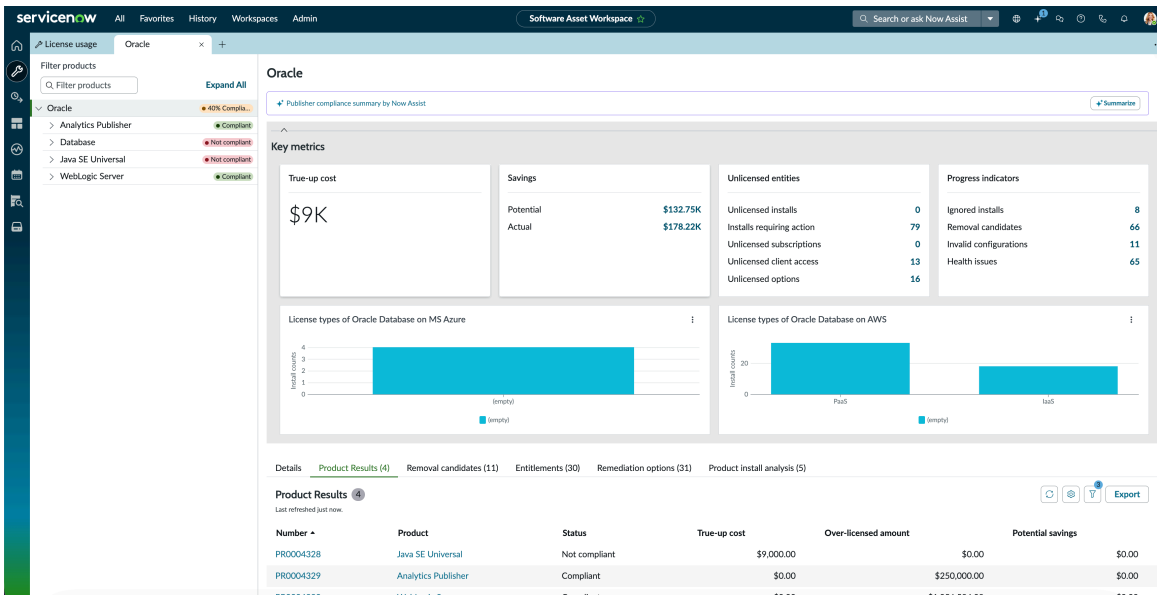
Report	Source list	Description
		including End of Extended Support, End of Life, and End of Support.

Publisher overview for Oracle in the Software Asset Workspace

View license usage information related to Oracle in the publisher overview for Oracle in the Software Asset Workspace.

From the Software Asset Workspace, access the Oracle publisher overview by navigating to **License usage** > **Publishers** and then selecting **Oracle** from the list of available software publishers.

Results are updated whenever a new reconciliation result is available.



You can view a summary of your license usage information in the Summary section of the Oracle publisher overview.

Oracle Summary

Report	Description
True-up cost	Cost to be compliant based on the average price of rights in your Oracle software entitlements.
Potential savings	Potential cost savings for your Oracle licenses.
Actual savings	Actual cost savings for your Oracle licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Summary (continued)

Report	Description
	• **Unlicensed installs**: Total number of unlicensed Oracle software installations. Select the number to view the complete list of unlicensed Oracle software installations. • **Installs requiring action**: Total number of Oracle software installations that you must take action on. Select the number to view the complete list of these Oracle software installations. • **Unlicensed subscriptions**: Total number of unlicensed Oracle subscriptions. Select the number to view the complete list of unlicensed Oracle subscriptions. • **Unlicensed client access**: Total number of unlicensed Oracle client access records. Select the number to view the complete list of unlicensed Oracle client access records. • **Unlicensed options**: Total number of unlicensed Oracle Database options and management packs. Select the number to view the complete list of unlicensed Oracle Database options and management packs.
Progress indicators	Summary of your license compliance progress. This summary includes the following indicators: • **Ignored installs**: Total number of Oracle software installations that were ignored during reclamation. Select the number to view the complete list of ignored Oracle software installations. • **Removal candidates**: Total number of Oracle removal candidates. Select the number to view the list of all software removal candidates. • **Invalid configurations**: Total number of Oracle removal candidates with invalid configurations. Select the number to view the complete list of these Oracle removal candidates.
License types of Oracle Database and WebLogic Server on MS Azure	Number of software installations for each license type that you are using in Microsoft Azure cloud environments. License types include BYOL and License Included.
License types of Oracle Database and WebLogic Server on AWS	Number of software installations for each license type that you are using in AWS cloud environments, based on the cloud service model through which your Oracle Database and WebLogic Servers are deployed. License types include BYOL and License Included. Cloud service models include PaaS (Platform as a Service) and IaaS (Infrastructure as a Service).

For more details on the license usage information that is provided in the publisher overview, see License usage publisher fields in workspace.

Software Asset Management publisher pack for SAP

Use the Software Asset Management publisher pack for SAP to manage and optimize your SAP licenses. Get comprehensive visibility into your SAP license compliance and uncover potential savings.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: You can use the SAP publisher pack to manage and optimize licensing for SAP NetWeaver 7.4, SAP_BASIS 740, and later versions.

Note: To use the publisher pack, install the Software Asset Management Professional for SAP plugin (com.sn_samp_sap).

Supported license types

The SAP publisher pack supports licensing for named users, engine measurement, third-party access, user subscription, and full usage equivalent.

Named Users

SAP named users are the members in your organization who use SAP applications. You can purchase different types of named user licenses and then assign each license to a named user.

The SAP publisher pack supports named user licenses for both SAP ERP Central Component (ECC) applications and SAP S/4HANA applications. Different named user license types are supported based on the application type. SAP ECC applications support various named user license types, including Professional, Limited Professional, and Employee Self Service. SAP S/4HANA applications support only the Developer Access, Enterprise Management for Professional Use, Enterprise Management for Functional Use, Enterprise Management for Productivity Use, Technical SAP Engine User, and Technical Use named user license types. The ServiceNow AI Platform supports all named user types for both SAP ECC applications and SAP S/4HANA applications.

Engines (automated, calculated, and self-declared)

SAP engines, also known as packages, are optional applications that require additional licenses. Every engine has a unique license metric that is used to calculate the license usage for the engine. Examples of license metrics include the number of employees or number of contracts.

License usage is calculated through either an automated SAP engine measurement, calculation based on multiple engine measurements plus an indicator, or a manual self-declaration process.

- If an engine is supported by the SAP engine measurement process, Software Asset Management automatically calculates the license usage for that engine.
- If an engine is identified to be composed of multiple engine measurements, Software Asset Management calculates this value if the indicator license metric is also available.
- If an engine isn't supported by the SAP engine measurement process, you must manually enter the license usage information for that engine using the self-declaration process. For information on how to self-declare your SAP engine license usage, see Self-declaring SAP engine license usage.

To view the complete list of engines that are supported by each process, see Engine & Self-Declaration Product Measurement in the SAP Support Portal.

Important: You must have an SAP Support Portal account to access the SAP Support Portal.

The SAP publisher pack supports engine licenses for both SAP ERP Central Component (ECC) applications and SAP S/4 HANA applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Starting with the Brazil release, revenue-based licensing support is enabled for SAP Engine products. You can use higher value revenue-based products for purchased rights and unit cost. For details on enabling the support for revenue-based licensing, see the knowledge base article KB1641524.

Digital Access

The Digital Access license applies to indirect usage of SAP systems by people or third-party applications without logging in to the system directly. A few examples for indirect usage of SAP systems are as follows:

- Using a third-party application to perform actions in the SAP system
- Entering data into the SAP system from a third-party application
- Viewing data in the SAP system from a third-party application

When you have many third-party product integrations with SAP systems, you can avoid unnecessary consumption of your named user license by purchasing Digital Access licenses. In this licensing model, the usage of SAP applications is licensed by the count of the predefined documents created by the third-party application. The details of the predefined document types are stored in the SAP Document Type [samp_sap_document] table that's installed with the Software Asset Management Professional for SAP (com.sn_samp_sap) plugin.

SAP Document types

Document name	Document multiplier
Sales document	1
Purchase document	1
Invoice document	1
Manufacturing document	1
Material document	0.2
Quality Management document	1
Service and Maintenance document	1
Financial document	0.2
Time Management document	1

The SAP system stores the digital access data of the supported document types for different users and client systems. Make sure you have any of the following tools to pull the digital access data from the SAP system to your ServiceNow instance:

- SAP Passport tool
- SAP Estimation tool

Note: When you purchase an SAP Digital Access license, these tools are available for installation without any additional cost. For details on the SAP tools, see SAP Help Portal.

When any of the predefined document types are created in the SAP system through a third-party application, the Digital Access licensing cost is applicable. However,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

there are no additional charges associated with reading, updating, or deleting these documents.

For the SAP Digital Access software model, digital access usage is calculated as follows:

1. The total count of documents of a particular document type created on each SAP system by all your users is calculated.

   Consider a scenario where User A created 5 Material documents, and User B created 5 Material and 10 Sales documents on an SAP system. The total count of Material documents is 10 and Sales documents is 10.

2. The license consumption is calculated by multiplying the total count of a particular document type by the Document multiplier.

   Based on the scenario mentioned in the preceding step, licenses consumed by Material documents is 2 (10*0.2) and by Sales documents is 10 (10*1). So, the total Digital Access license consumed is 12.

Note: The SAP Digital Access software model is installed with the Software Asset Management Professional for SAP (com.sn_samp_sap) plugin.

Reconciliation for the SAP Digital Access software model is done by comparing the Purchased rights with the licenses that you consumed.

User Subscription and Full Usage Equivalent (FUE)

Full Usage Equivalent (FUE) is a licensing framework for SAP S/4HANA Cloud applications. FUE grants access to the number of users that are authorized to access specified solution capabilities. A single FUE can be allocated across four cloud use types and each use type has a specific weighting factor:

- Self-Service
- Core
- Advanced
- Development

The FUE framework applies to both SAP S/4HANA Cloud, Public Edition and SAP S/4HANA Cloud, Private Edition. The license metric name differs by deployment:

- For SAP S/4HANA Cloud, Public Edition, the metric is named **User Subscription**. In releases earlier than Brazil, this metric was named Full Usage Equivalent.
- For SAP S/4HANA Cloud, Private Edition, the metric is named **Full Usage Equivalent**.

The predefined cloud use types for SAP S/4HANA Cloud, Public Edition are stored in the SAP Cloud Use Types [samp_sap_cloud_use_type] table that's installed with the SAP S/4HANA Spoke plugin (sn_s4_hana_cld_spk).

For SAP S/4HANA Cloud, Private Edition, the use type for each user is determined on the SAP system during use collection. Based on this classification during data collection. For details on uploading the license ruleset for Private Edition, see Upload the license ruleset for SAP S/4HANA Private Cloud. For details on SAP S/4HANA Cloud, Public Edition, see Integrating with SAP S/4HANA Cloud Public Edition.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For descriptions of each cloud use type, the weighting factors, and how FUE licenses are calculated, see License calculation for SAP cloud use types.

Note: The FUE feature requires the following minimum system requirements:

- Environment: ECS
- Deployment Type: SAP S/4HANA Cloud Private Edition
- SAP S/4HANA Version: 2025
- FPS Level: FPS01 (02/2026)
- SAP_BASIS: 816

SAP connection with the ServiceNow AI Platform

To start connecting your SAP systems and your ServiceNow instance, see Set up SAP integration to establish a connection with SAP. After completing the configuration, establish an SAP connection using one of the following authentication methods:

- Basic Authentication
- OAuth 2.0

The Software Asset Management publisher pack for SAP uses a centralized design. When you import transport files into an SAP client that is considered a central system, the client uses the custom program-selected Remote Function Call (RFC) connection list to connect all other clients through RFC from the central system. It then fetches data to store in central system custom tables. To import the transport files, use either the SAP Solution Manager or another SAP client that has RFC connections activated to fetch data into a central system.

After the connection is established, data is pulled into your ServiceNow instance from your SAP system. For a list of all data that is pulled, see Tables installed with the SAP publisher pack.

SAP data is scheduled to be pulled weekly. User activity data, web activity data, and engine usage data are pulled monthly. All user and web activity is deleted after 90 days. Engine usage measurement records in the SAP License Metric Measurement table [samp_sap_license_metric_measurement] are deleted after one year.

When SAP data enters the ServiceNow AI Platform, it's initially stored in staging tables before it's transferred to the final SAP tables. To edit the tables where data transfer takes place or to view the transfer logic, see transform maps.

Note: The user activity and web activity transform maps aren't enabled by default because they may cause performance issues due to the large amount of data. However, you can manually enable these transform maps. To enable the activity transform maps, navigate to **All** > **Software Asset** > **SAP Compliance and Optimization** > **SAP Connections** and select the connection. In the Configuration section, set the **Fetch activity** field to **True** and then select **Update**.

View SAP license usage and compliance

View your SAP license costs, usage, and compliance using the Software Publisher Analytics dashboard (Software Asset Management classic application) or publisher overview (Software Asset Workspace). The dashboard and overview also show how you can optimize license consumption by reassigning user roles in your SAP system. You can view the license optimization details in the Software asset analytics view. For more details, see Publisher optimizations for SAP.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reconciliation runs weekly or on demand to determine your license compliance position for all of your SAP products. Reconciliation compares your purchased rights recorded in software entitlements with actual usage data pulled from your SAP systems. You can view reconciliation results for SAP in the License usage view of the Software Asset Workspace. The License usage view shows unlicensed users and engines, digital access licenses available and required, and remediation options to make your license position compliant, potential savings, and more. For more information on the License usage view, see License usage view.

To view Software license compliance position reports for SAP, navigate to **License usage** > **Reports** > **Software license compliance position** in the Software Asset Workspace.

SAP publisher pack integration architecture

The SAP publisher pack integration architecture defines how licensing, user, engine, and database usage data flows from SAP systems to ServiceNow for software reconciliation and compliance reporting.

ServiceNow communicates exclusively with one central SAP system. That central system reaches one or more satellite SAP systems such as Solution Manager, S/4HANA, GRC, or ECC over RFC (Remote Function Call). ServiceNow never connects to satellite systems directly.

Connection types

The integration supports two interchangeable connection types: SOAP/WSDL with Basic Authentication and OData with OAuth 2.0. Both connection types perform the same refresh and pull operations; the difference is in the entry point and response format.

Important: Basic Auth (SOAP/WSDL) will be deprecated by SAP after November 2026. OAuth 2.0 is the recommended connection type for all new integrations, including SAP S/4HANA Cloud, Private Edition.

SOAP/WSDL vs OData/OAuth comparison

Area	Basic — SOAP/WSDL	OData / OAuth 2.0
Entry point	RFC Function Module	SAP Gateway Service
SAP layer	Function module called directly	Gateway → DPC_EXT → Function module
Refresh	Refresh FM (via `I_REQUEST_TYPE`)	OData Action → `/NOW/SAMP_USER_DETAILS_REFRESH`
Data pull	Pull FM (via `I_REQUEST_TYPE`)	OData Action → `/NOW/SAMP_USER_DETAILS_PULL`
Response format	XML only	XML or JSON
Status	Deprecation planned in November 2026	Recommended

Integration architecture

The following diagram shows the four layers of the integration:

- The software asset management layer
- The connection layer
- The central system, which contains the three processing phases and the staging layer
- The satellite systems

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

How the integration works

The integration operates in the following three phases:

Note: All three phases run automatically. No manual action is required during data collection or retrieval operations.

1. Phase 1 — Refresh and job scheduling: When the Software Asset Management application sends a refresh request, the central SAP system receives it through either the SOAP/WSDL endpoint or the OData/OAuth gateway. The entry function module evaluates the request type and triggers class `/NOW/SAMP_CL_USER_DETAILS`, which schedules a background job (`JOB_OPEN → SUBMIT → JOB_CLOSE`). The dispatcher program `/NOW/SAMP_USER_PROG_BCKJOB_RUN` then calls `GET_*_DATA_THR_RFC` for each active RFC destination.
2. Phase 2 — RFC extraction: The central system loops through each configured RFC destination and calls `RFC_READ_TABLE` and RFC-enabled function modules or BAPIs on the satellite

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

system. This reads standard SAP tables such as USR02, AGR_USERS, ADRP, TUPL, and AGR_FLAGS, and writes the results into 12 custom /NOW/* staging tables on the central system.

3. Phase 3 — Data pull and retrieval: When the Software Asset Management application sends a pull request, the central system reads the staging tables using GET_DATA_FROM_*_TABLE. The SAP system applies filters by RFC name, system ID, client, offset, and limit for pagination. It converts the records to XML or JSON payload in ET_XML_TABLE and returns the SOAP or OData response. ServiceNow processes the response and updates its internal tables.

Staging layer

Phases 2 and 3 both interact with a set of intermediate tables on the central SAP system. Phase 2 writes into these tables and Phase 3 reads from them. This staging layer decouples the RFC collection step from the data transfer step, preventing long-running synchronous calls to ServiceNow.

The following table lists all staging tables and their content.

Staging tables [/NOW/*]

Table	Content
/NOW/M_USER_DATA	User data including Named User Type and, for Cloud Private deployments, target FUE classification
/NOW/M_SAP_ROLES	SAP role definitions
/NOW/M_USER_ROLE	User-to-role assignments
/NOW/M_USR_ACTIT	User activity data
/NOW/M_USR_TCODE	Transaction codes used per user
/NOW/SAP_TCODES	SAP transaction code definitions
/NOW/M_ENGINES	SAP engine usage data (collected from S/4HANA via Special Scenario 1)
/NOW/USMM_DATA	USMM-based license measurement data
/NOW/SAMP_PRICE	Price list data for license cost calculation
/NOW/SAMP_RFC	RFC destination configuration data, including deployment type (Cloud Private or on-premises) for each connected system
/NOW/DIGITAL_ACC	Digital Access document count data for indirect access licensing
/NOW/WEB_ACTIVITY	Web activity data from connected SAP systems

Special scenarios

Two special scenarios exist where standard SAP tables do not hold the required data. In these cases, custom function modules on the satellite systems collect the data separately and write it into dedicated staging tables.

Special Scenario 1 — Engine data (Satellite 2: S/4HANA only)

A custom function module on the S/4HANA satellite writes engine usage data to /NOW/HANA_DB. The central system reads this table and stages the data into /NOW/M_ENGINES. This special case applies only to S/4HANA satellite systems and collects HANA database usage metrics for engine license measurement.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Special Scenario 2 — FUE user classification (all satellites)

A custom function module on each satellite triggers the SAP user classification program (`SLIM_USER_CLF_HELP`, also referred to as the STAR report). The program applies the uploaded license ruleset to classify each user into a Named User Type — Developer (GA), Advanced (GB), Core (GC), or Self-Service (GD). It writes the results to `/NOW/M_USER_CLF` on the satellite. The central system reads this staging table over RFC and updates `/NOW/M_USER_DATA` with the License classification values. This special case applies to all satellite systems and is required for Full Usage Equivalent (FUE) license calculation.

Design principles

- ServiceNow communicates only with the central SAP system. Satellite systems are never accessed directly.
- The central SAP system exposes the WSDL endpoint and SAP Gateway. Satellite systems are reached exclusively over RFC.
- Multiple satellite systems can send data to one central system. The RFC loop in Phase 2 repeats for each configured RFC destination.
- Background jobs in Phase 1 prevent long-running synchronous calls between the central system and satellites.
- Supported satellite system types include ECC, S/4HANA, GRC, and Solution Manager.

Related topics

Set up SAP integration to establish a connection with SAP

Deploy the ABAP program for SAP

Upload the license ruleset for SAP S/4HANA Private Cloud

Establish a trusted HTTPS connection for SAP S/4HANA Cloud, Private Edition

Tables installed with the SAP publisher pack

Tables installed with the SAP publisher pack

Tables are installed with the Software Asset Management Professional for SAP plugin. The tables store data pulled from the SAP systems.

Note: Use the Application Files table to see all components installed with the SAP publisher pack. For more information, see Find components installed with an application.

Demo data is available for the SAP publisher pack.

Tables

Table	Description
Named User Type Role [samp_named_user_type_has_role]	Roles assigned to each named user type.
SAP Client [samp_sap_client]	Remote Function Call (RFC) destination connecting Advanced Business Application Programming (ABAP) systems to external systems.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
	To view the table, navigate to **SAP Compliance and Optimization** > **Administration** > **SAP Clients**.
SAP Connection [samp_sap_connection]	SAP system connections. To view the table, navigate to **SAP Compliance and Optimization** > **Administration** > **SAP Connections**.
SAP Engine Usage [samp_sap_sw_client_access]	Most recent engine usage measurements for SAP clients based on the license metric for each engine.
SAP License Metric [samp_sap_license_metric]	This table is populated by the ServiceNow Content Service. It's a list of all license metrics that are used by SAP engines. To view the table, navigate to **SAP Compliance and Optimization** > **Administration** > **Engines**. **Note:** The table is periodically updated with new data from the Content Service. New license metrics may be added, and existing license metrics may be deactivated to reflect current SAP licensing. To view your software models that have deactivated license metrics, navigate to **SAP Compliance and Optimization** > **Administration** > **Software Models with Deactivated SAP License Metrics**.
SAP License Metric Measurement [samp_sap_license_metric_measurement]	Monthly engine usage measurements for SAP clients based on the license metric for each engine. To view the table, navigate to **SAP Compliance and Optimization** > **Licensing** > **All SAP Engines**.
SAP Roles [samp_sap_role]	SAP roles pulled from the SAP systems.
SAP System User [samp_sap_system_user]	Discovered users pulled from the SAP systems. To view the table, navigate to **SAP Compliance and Optimization** > **Licensing** > **All SAP Users**. **Note:** The Discovered Users table [samp_discovered_user] maps the discovered SAP users to system user records in the Users table [sys_user].
SAP User Activity [samp_sap_user_activity]	Data related to a user's activity on an SAP client, such as the amount of time spent on an SAP system or the number of database records created or updated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
SAP User Roles [samp_sap_user_has_role]	SAP users and their assigned roles.
SAP Web Activity [samp_sap_web_activity]	Data related to web activity or RFC connections performed in the SAP client, such as the number of calls or amount of data received or sent by each connection.
SAP User Active Transactions [samp_named_user_type_has_transactions]	Data related to a named user's transaction activity on an SAP client. User transaction activity is based on SAP transaction codes, which are shortcuts for performing transactions or tasks on an SAP client. For example, the ME21N transaction code enables you to create a purchase order in SAP.
SAP USMM Rules [samp_sap_usmm_rule]	USMM rules information from all connected SAP applications.

Note: Staging tables for SAP data are also installed.

Data from SAP is also stored in some additional tables that aren't part of the SAP publisher pack.

Tables that aren't included in the SAP publisher pack

Table	Navigation
Price List [samp_price_list]	**SAP Compliance and Optimization** > **Administration** > **Price Lists**
Named User Type [samp_named_user_type]	**SAP Compliance and Optimization** > **Administration** > **Named User Types**
SAP Digital Access [samp_sap_digital_access]	**Workspaces** > **Software Asset Workspace** > **License operations** > **Discovery** > **SAP Digital Access Data**

The Digital Access table stores the following fields: Client, User name, Document type, Document type count, and Measured by.

Mapping between SAP tables and Software Asset Management tables

SAP table	Software Asset Management table
/NOW/SAMP_RFC	SAP Client [samp_sap_client]
/NOW/M_SAP_ROLES	SAP Roles [samp_sap_role]
/NOW/SAP_TCODES	SAP Transactions [samp_sap_transactions]
/NOW/M_USER_DATA	SAP System User [samp_sap_system_user]
/NOW/M_USR_TCODE	SAP User Active Transactions [samp_named_user_type_has_transactions]
/NOW/M_USER_ROLE	SAP User Roles [samp_sap_user_has_role]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SAP table	Software Asset Management table
/NOW/M_USR_ACTIT	SAP User Activity [samp_sap_user_activity]
/NOW/WEB_ACTIVTY	SAP Web Activity [samp_sap_web_activity]
/NOW/M_ENGINES	SAP License Metric Measurement [samp_sap_license_metric_measurement]
/NOW/USMM_DATA	SAP USMM Rules [samp_sap_usmm_rule]
/NOW/DIGITAL_ACC	SAP Digital Access [samp_sap_digital_access]

Set up SAP integration to establish a connection with SAP

Configure SAP integration to establish a connection between your Software Asset Management application and SAP.

Configure SAP integration, users, roles, and authorizations that are required to establish a connection between your Software Asset Management application and SAP.

1. Deploy the ABAP program for SAP
2. Create a WSDL for the SAP service definition
3. Create SAP users, roles, and authorizations
4. Upload the license ruleset for SAP S/4HANA Private Cloud
5. Establish a trusted HTTPS connection for SAP S/4HANA Cloud, Private Edition
6. Select SAP clients to import data
7. Activate OData services and assign a system alias
8. Create a system user for OAuth authentication in SAP
9. Configure an OAuth client in SAP
10. Configure roles and authorizations for the OAuth user

Note: The steps to upload the license ruleset and establish a trusted HTTPS connection for SAP S/4HANA Cloud, Private Edition apply only to SAP S/4HANA Cloud, Private Edition deployments. On-premises SAP deployments do not require these steps.

SAP jobs that must be scheduled

You must schedule the following program as a weekly job in the central system where the SAP transports are installed and the roles are configured:

Program name: `/NOW/SAMP_ENGINES_PROG`

Frequency: Weekly (every Thursday)

Deploy the ABAP program for SAP

Deploy the Advanced Business Application Programming (ABAP) program to establish a connection between your SAP system and your ServiceNow instance. Deploying the ABAP program allows data to be shared between SAP and your ServiceNow instance.

Before you begin

Download the SAP ABAP for Software Asset Management application from the ServiceNow Store. Download the application version that is compatible with the Brazil release.

Note: The ABAP program performs only read operations on existing standard functional modules. It does not modify these modules in any way.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role required: sam_admin, SAP Basis administrator

About this task

To deploy the ABAP program, import the transport files that are provided through the SAP ABAP for Software Asset Management application and then configure a service provider with the service-oriented architecture (SOA) Manager.

Note: If you upgrade your ServiceNow instance, you must download and deploy the version of the ABAP program that is compatible with the new release.

You must read all Release notes and Requirements under the Version details section in the SAP ABAP for Software Asset Management application. The download folder contains multiple transport files. Deploy only the transport requests that apply to your SAP system type and the functionality that you require.

Four different transport requests (TR) are provided in the ABAP ZIP file. Refer to the following table to see what purpose each transport request serves depending on the system type and required functionality.

Transport type	Purpose	Supported systems	Notes
Central Transport – With Digital Access	Includes Digital Access logic for extracting data such as sales documents, purchase orders, financial invoices, and so on.	• SAP ERP Central Component (ECC) • SAP S/4HANA • SAP S/4HANA Cloud, Private Edition	Used when Digital Access data collection is required.
Central Transport – Without Digital Access	Does not include Digital Access logic for document extraction.	• SAP ECC • SAP Solution Manager • SAP GRC • SAP S/4HANA • SAP S/4HANA Cloud, Private Edition	Used when Digital Access data collection is not required.
Satellite Transport for On-Premises	Contains SAP S/4HANA Database–specific code that is required for data extraction from satellite systems.	SAP S/4HANA	Import only if the satellite or RFC system is SAP S/4HANA.
Satellite Transport for Private Cloud	Contains SAP S/4HANA Database–specific code and Full Usage Equivalent (FUE) user classification code that is required for	SAP S/4HANA Cloud, Private Edition	Import only if the satellite or RFC system is SAP S/4HANA Cloud, Private Edition.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Transport type	Purpose	Supported systems	Notes
	data extraction from satellite systems.		

Note: You must deploy one of the central transport types according to your requirement. For satellite or RFC systems, deploy the satellite transport that matches your deployment: the on-premises satellite transport for SAP S/4HANA satellite systems, or the Private Cloud satellite transport for SAP S/4HANA Cloud, Private Edition satellite systems.

For further information on SAP setup, see KB0813999.

For more information on SAP and its related tools, refer to the SAP Help Portal.

Procedure

1. In your SAP system, import all applicable transport files using the SAP Transport Management System (STMS).
2. Copy and extract the COFILE and DATA files to your directory.
3. Start STMS and select **Import Overview**.
4. Double-click the target system, select **Extras** > **Other Requests** > **Add**, and then enter the transport request number.
5. Highlight the request and select **Request** > **Import**.
6. From the Import Transport Request window, enter the client number in the **Target Client** field.
7. Select the Options tab, and then select the **Ignore Invalid Component Version** check box.
8. Select **OK**.
9. Verify the RFC connection.

What to do next

In your SAP system, configure a service provider with the SOA Manager and generate a Web Services Description Language (WSDL) URL for the SAP service definition. For details, see Create a WSDL for the SAP service definition.

Create a WSDL for the SAP service definition

Generate a Web Services Description Language (WSDL) URL for the SAP service definition to use when creating SAP connections on your ServiceNow instance.

Before you begin

The SAP transport files for your ServiceNow instance version must be available from the SAP ABAP Program for the Software Asset Management application. You must import the central transport request (TR) into the central system. If your satellite system is SAP S/4HANA, you must also import the corresponding satellite TR into the satellite system.

Role required: SAP Basis administrator

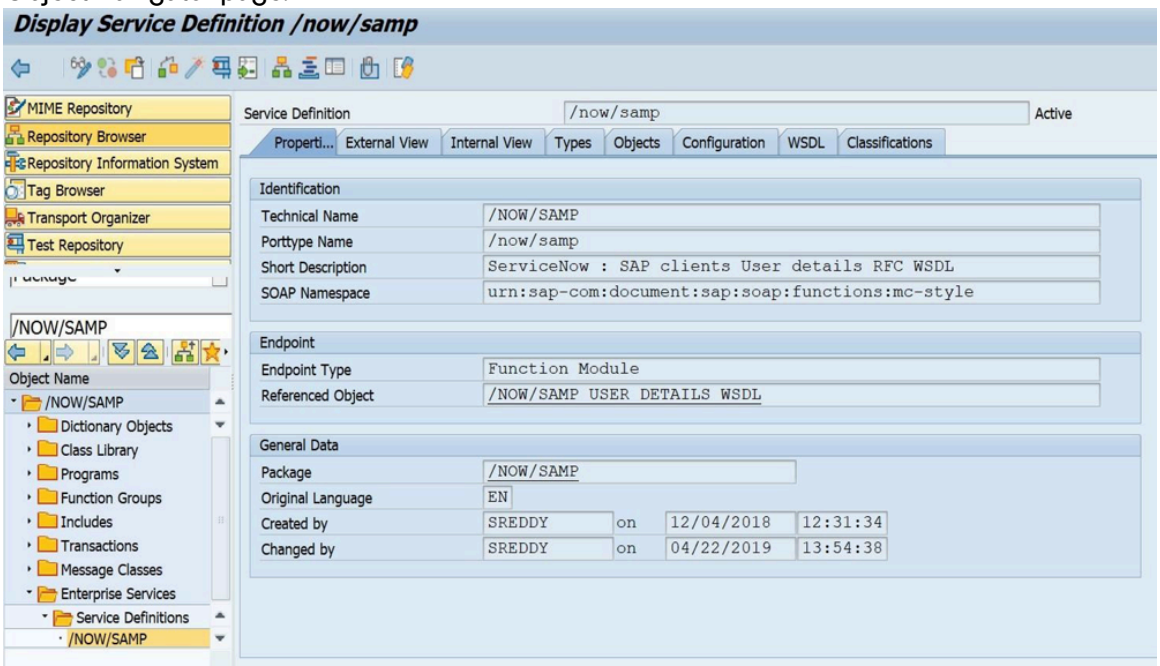
About this task

After importing the transport files into your SAP system, configure the service binding in the SOA Manager and generate the WSDL URL. You must save the WSDL URL for use when creating SAP connections in your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. In your SAP system, open the **SE80** (Object Navigator) transaction code.
2. Verify that the ServiceNow service definition is active by navigating to **/NOW/SAMP** > **Enterprise Services** > **Service Definitions** > **/NOW/SAMP** in the **Object Name** menu on the Object Navigator page.



3. After verification, navigate to the **SOAMANAGER** transaction code.
4. On the Service Administration tab of the SOA Management page, select **Web service configuration**.
5. On the Web Service Configuration page, in the **Search Criteria** section of the Object Search tab, fill in the fields.

Object Search criteria

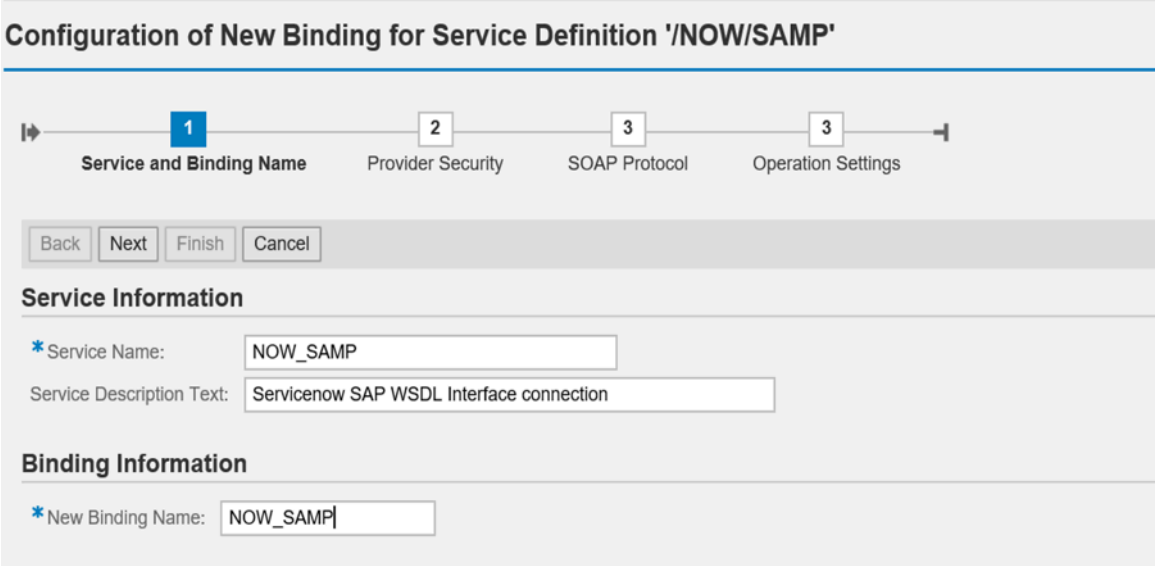
Field	Value
Object Type	`All`
Object Name	`/NOW/SAMP`

6. Select **Search**.
7. Select the search result **/NOW/SAMP**.
8. On the **Configurations** tab of the service definition details, select **Create Service**.
9. In step 1, on the Configuration of New Binding for Service Definition '/NOW/SAMP' page, fill in the fields.

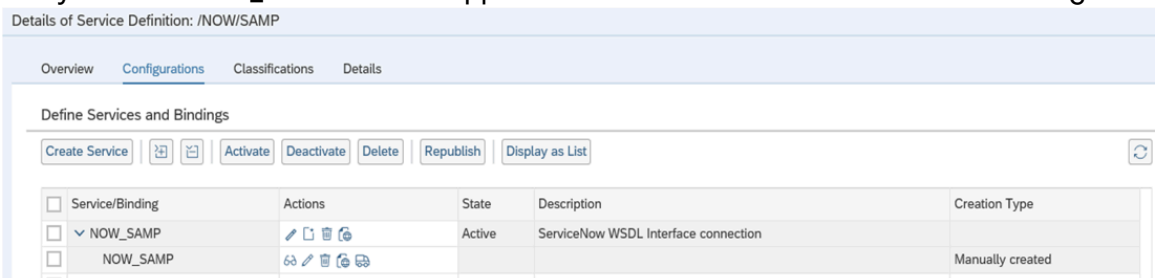
Step 1- Service and Binding Name

Field	Value
Service Name	`NOW_SAMP`
Service Description Text	A brief description of the service.
New Binding Name	`NOW_SAMP`

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



10. Select **Next**.
11. In step 2, set the **Transport Channel Authentication** method to **User ID/Password** in the Authentication Settings section.
12. Select **Finish** to complete the service configuration.
    The configuration is complete and you automatically return to the **Configurations** tab of the /NOW/SAMP service definition details.
13. Verify that the **NOW_SAMP** service appears in the list of available services and bindings.



14. In the **NOW_SAMP** list entry, select the **Open service WSDL generation** icon to generate a WSDL URL for the service.
15. Copy the URL from the **WSDL URL for Service** field and save it in a secure location for later use.
    You must activate all Internet Communication Framework (ICF) services in SICF before creating the SAP connection. To do this, run the SICF (Maintain Services) transaction on the front-end SAP server and select **Service/Host** > **Activate** to activate the services.

What to do next

Create SAP users, roles, and authorizations that can be used with the Software Asset Management integration. For details, see Create SAP users, roles, and authorizations.

Create SAP users, roles, and authorizations

Create the SAP user, roles, and authorization objects required for the Software Asset Management integration with the central and satellite SAP systems.

Before you begin

The SAP transport files must be imported into the central system before configuring users and roles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role required: SAP Basis administrator

About this task

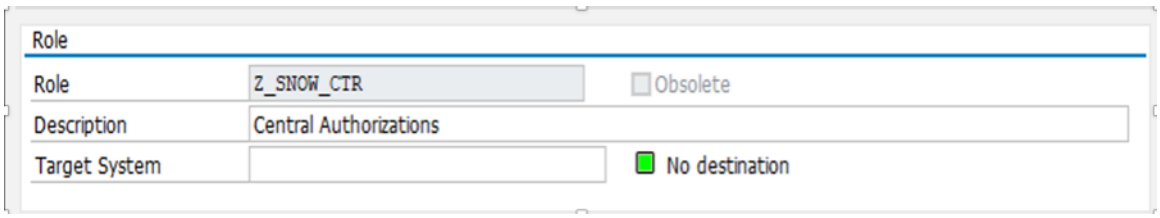
The Software Asset Management integration requires a dedicated SAP user with separate roles for the central system and each satellite system. Central system roles control background job scheduling and service access. Satellite system roles control RFC execution and table display access.

Procedure

1. Create a user ID `S_SERVICENOW` in your SAP system.
   If the user already exists, remove the current authorizations and set up new authorizations with central and satellite system permissions.
2. Create a central system role.

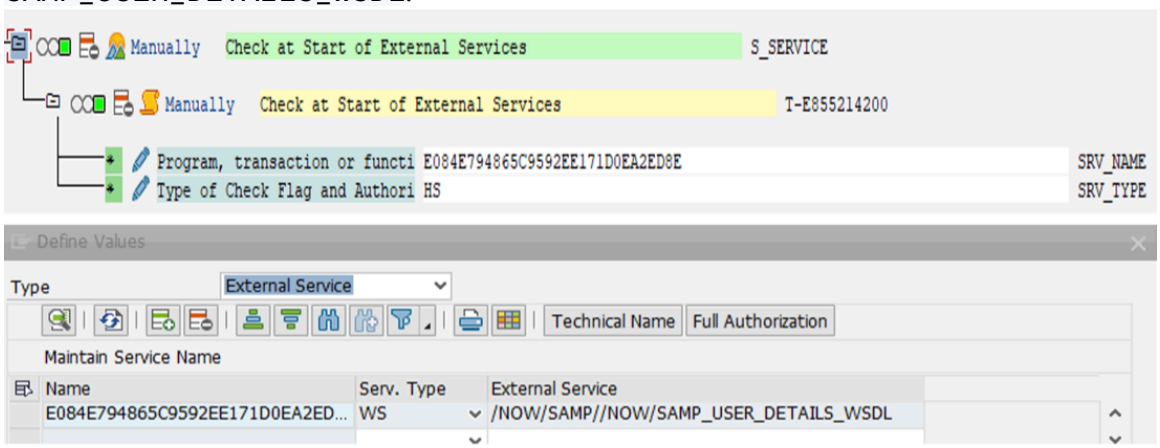
   a. Navigate to transaction code **PFCG**.

   b. On the Role Maintenance page, enter a role name in the **Role** field.
   For example, `Z_SNOW_CTR`.



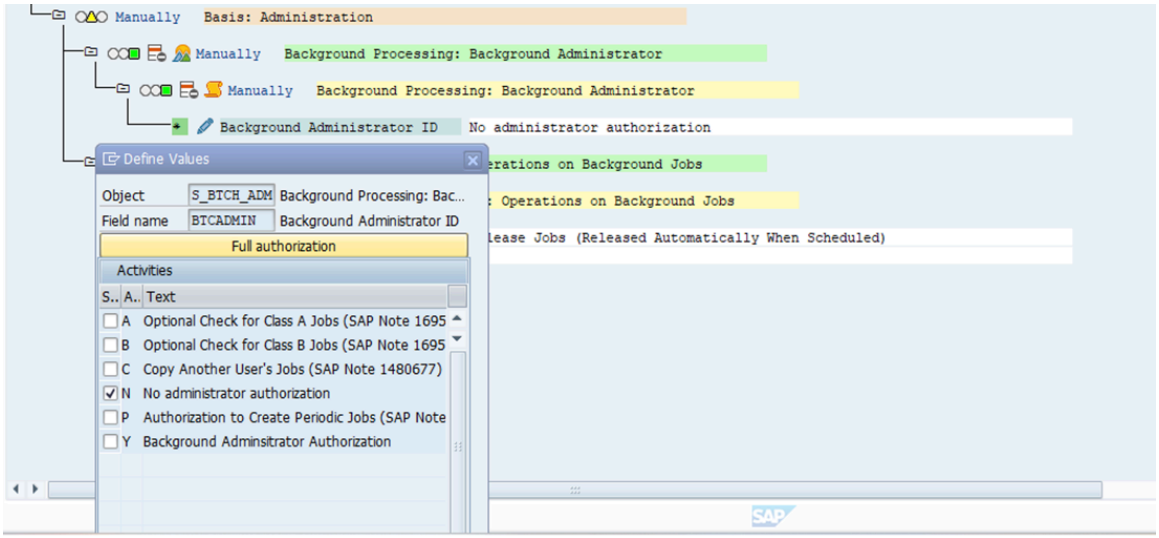
   c. In the **Description** field, enter a brief description of the role and save.

   d. Add authorization object `S_SERVICE` and add external service name `/NOW/SAMP//NOW/SAMP_USER_DETAILS_WSDL`.

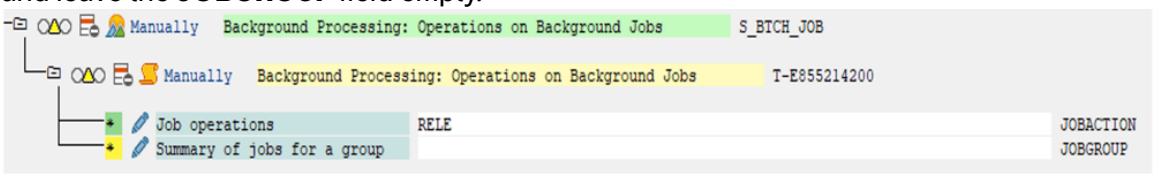


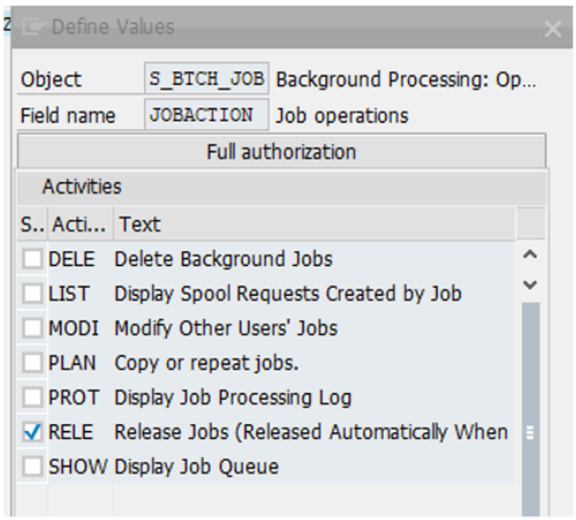
   e. Add authorization object `S_BTCH_ADM` and select the **N (No administrator authorization)** option in the **Activities** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



f. Add authorization object S_BTCH_JOB, select **RELE (Release Jobs)** in the **Activities** field, and leave the **JOBGROUP** field empty.

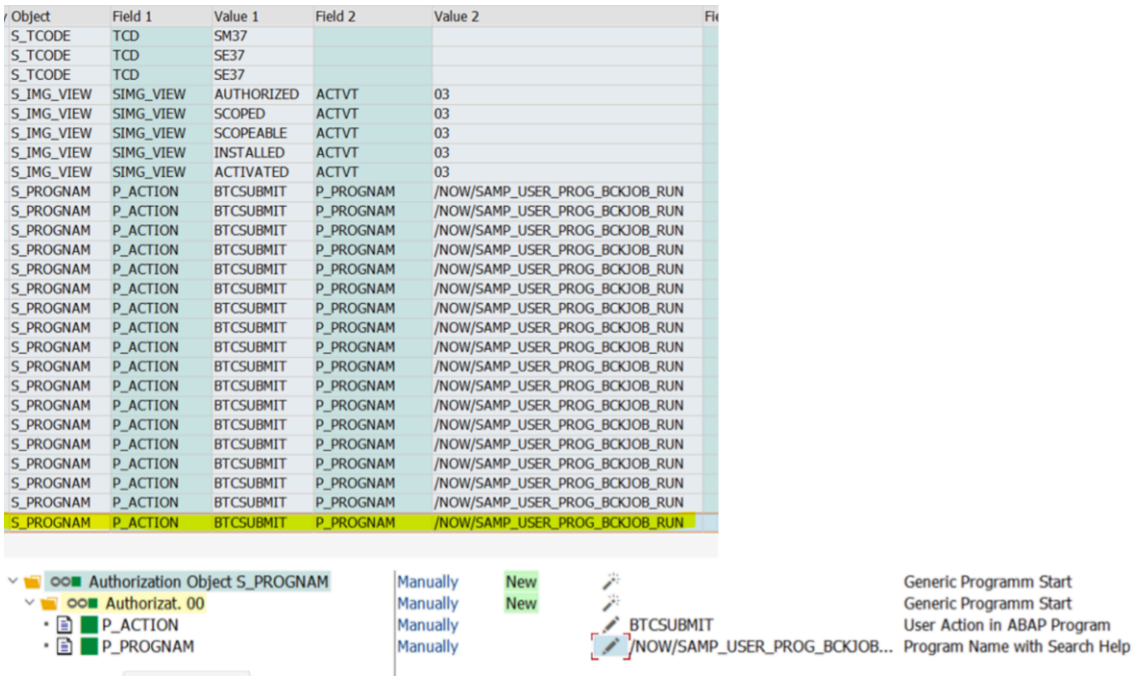




g. Optional: If the central system is a SAP S/4HANA system, add authorization object S_PROGNAM and the following values in the corresponding fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **P_ACTION** – `BTCSUBMIT`
- **P_PROGNAM** – `/NOW/SAMP_USER_PROG_BCKJOB_RUN`

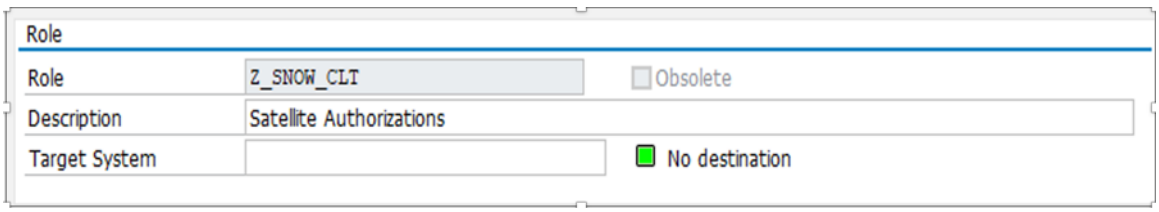


Object	Field 1	Value 1	Field 2	Value 2
S_TCODE	TCD	SM37		
S_TCODE	TCD	SE37		
S_TCODE	TCD	SE37		
S_IMG_VIEW	SIMG_VIEW	AUTHORIZED	ACTVT	03
S_IMG_VIEW	SIMG_VIEW	SCOPED	ACTVT	03
S_IMG_VIEW	SIMG_VIEW	SCOPEABLE	ACTVT	03
S_IMG_VIEW	SIMG_VIEW	INSTALLED	ACTVT	03
S_IMG_VIEW	SIMG_VIEW	ACTIVATED	ACTVT	03
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN
S_PROGNAM	P_ACTION	BTCSUBMIT	P_PROGNAM	/NOW/SAMP_USER_PROG_BCKJOB_RUN

3. Create a satellite system role.

   a. Navigate to transaction code **PFCG**.

   b. On the Role Maintenance page, enter a role name in the **Role** field.
   For example, `Z_SNOW_CLT`.



   c. In the **Description** field, enter a brief description of the role and save.

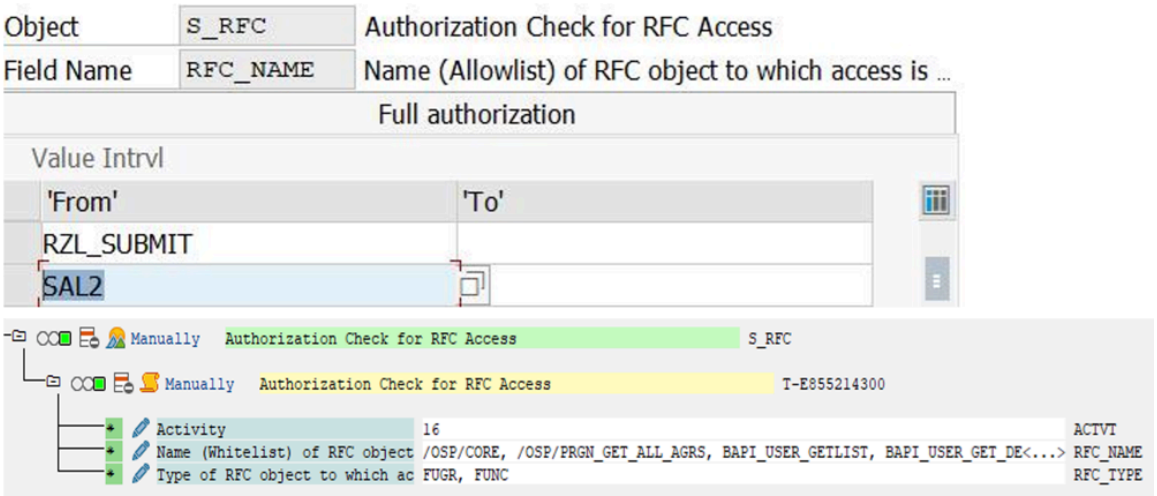
   d. Add authorization object `S_RFC` and fill in the following values for the fields.

Field values for authorization object S_RFC

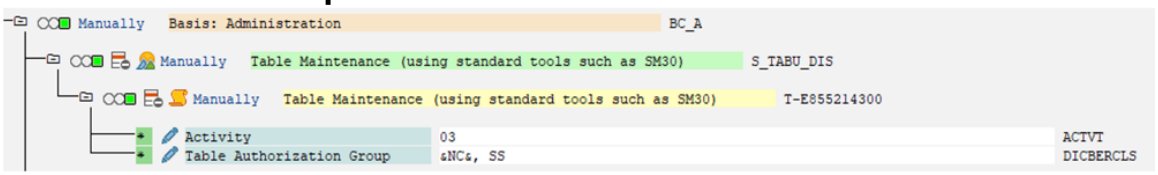
Field	Value
Activity	`16` This code refers to Execute.
RFC_NAME	`/OSP/CORE`, `/OSP/PRGN_GET_ALL_AGRS`, `BAPI_USER_GETLIST`, `BAPI_USER_GET_DETAIL`, `MENU_READ_TSTC`, `RFC_READ_TABLE`,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	RFCPING, SCSM_COLLECTOR, SDTX, SMNV_MIGRATION, STR9, SU_USER, SWNC_COLLECTOR_GET_AGGREGATES, SYSU, TR_SYS_PARAMS, /NOW/SAMP, /NOW/SAMP_HANADB, OCS_CRM, OCS_GET_INSTALLED_SWPRODUCTS **Note:** If connecting to SAP S/4HANA Private cloud, enter /NOW/SAMP_SLIM_USER_CLF as an additional RFC.
RFC_TYPE	FUGR and FUNC Here, FUGR is the Function Group and FUNC is the Function Module.



e. Add authorization object S_TABU_DIS and enter 03 in the **Activity** and &NC&, SS in the **Table Authorization Group** field.

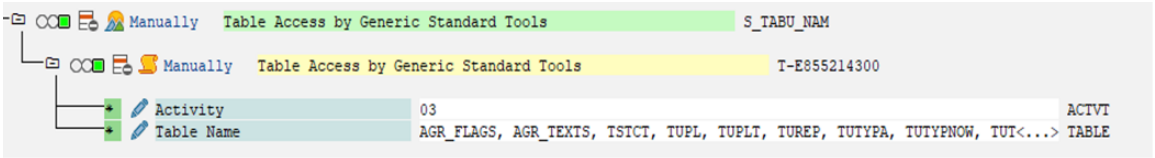


f. Add authorization object S_TABU_NAM and fill in the following values for the fields.

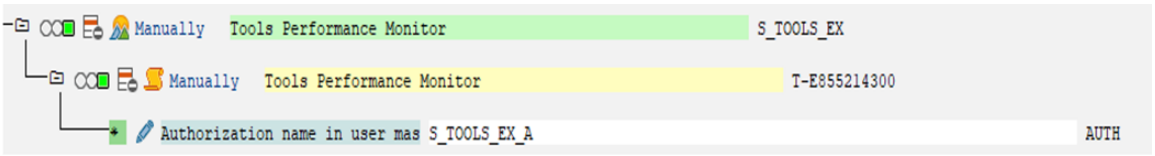
Field values for authorization object S_TABU_NAM

Field	Value
Activity	03 This code refers to Display.
Table Name	AGR_FLAGS, AGR_TEXTS, TSTCT, TUPL, TUPLT, TUREP, TUTYPA, TUTYPNOW, TUTYPPL, USR41_MLD, T000

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



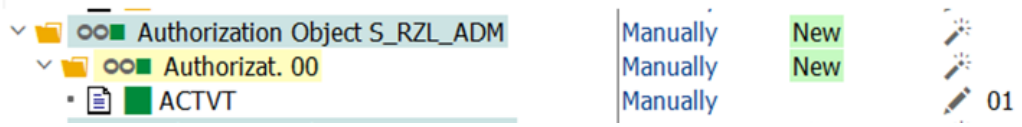
g. Add authorization object S_TOOLS_EX and enter S_TOOLS_EX_A in the **Authorization name in user master main** field.



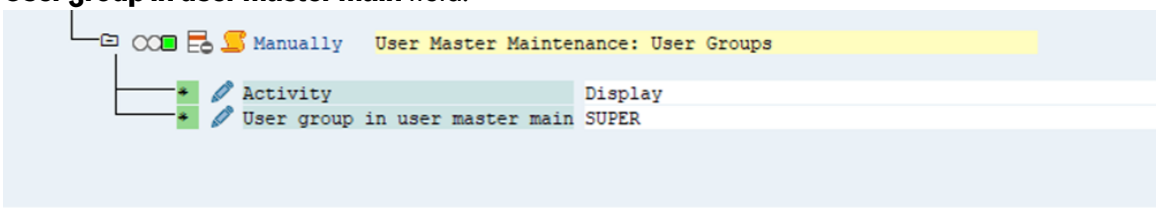
h. Add authorization object S_BTCH_ADM and select the **N (No administrator authorization)** option in the **Activities** field.

i. Add authorization object S_BTCH_JOB, select **RELE (Release Jobs)** in the **Activities** field, and leave the **JOBGROUP** field empty.

j. Add authorization object S_RZL_ADM and enter 01 in the **Activity** field.



k. Add authorization object S_USER_GRP and enter 03 in the **Activity** field and SUPER in the **User group in user master main** field.



4. Assign the central system role to the S_SERVICENOW user in the central system, and the satellite system role to the same user in each satellite system.

Authorization objects and their descriptions

Authorization object	Description
S_RFC	Verifies that the called RFC user is authorized to execute RFC function modules.
S_SERVICE	Verifies the start of your external services.
S_TCODE	Initiates an SAP transaction from the command box or menu.
S_BTCH_ADM	Manages background processing.
S_BTCH_JOB	Manages background jobs.
S_RZL_ADM	Maintains external system commands.
S_TABU_DIS	Controls table access to users.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Authorization object	Description
S_TABU_NAM	Provides authorizations for tables based on the table name instead of the table authorization group.
S_TOOLS_EX	Monitors tool performance.
S_USR_GRP	Performs user maintenance for several transactions.

What to do next

If you're integrating with SAP S/4HANA Cloud, Private Edition, then upload the license ruleset file to your SAP system to enable Full Usage Equivalent (FUE) user classification. For more information, see Upload the license ruleset for SAP S/4HANA Private Cloud. In case of on-premises integration, select the Remote Function Call (RFC) connections that the SAP ABAP program uses to import data from your SAP clients. For more information, see Select SAP clients to import data.

Upload the license ruleset for SAP S/4HANA Private Cloud

Upload the license ruleset file to your SAP system to enable Full Usage Equivalent (FUE) user classification for SAP S/4HANA Cloud, Private Edition.

Before you begin

- Deploy the SAP S/4HANA Private Cloud satellite transport on your SAP system. For more information, see Deploy the ABAP program for SAP.
- Obtain the `License_Ruleset.xlsx` template file from the ServiceNow Store download package.

Role required: SAP Basis administrator

About this task

Note: Use this task only for SAP S/4HANA Cloud, Private Edition deployments. If your SAP system already has a compatible license ruleset stored, skip this task. The existing ruleset is used automatically during FUE user classification.

The license ruleset defines the classification rules that the SAP user classification program (`SLIM_USER_CLF_HELP`) uses to determine the FUE license type for each user. The ruleset maps SAP roles and transaction codes to Named User Types — Developer (GA), Advanced (GB), Core (GC), and Self-Service (GD). This upload is a one-time setup step. After the ruleset is stored in your SAP system, the classification program runs automatically on a schedule without requiring manual input.

Procedure

1. Log on to your SAP S/4HANA Private Cloud system using SAP log in details.
2. In the **command** field, enter transaction code `SA38` and press **Enter**.
3. In the **Program** field, enter `SLIM_USER_CLF_HELP` and select **Execute**.
4. On the SAP License Administration Workbench screen, select **Manage Rulesets & Results**.
5. Select **Upload Ruleset**.
6. Browse to the location of the `License_Ruleset.xlsx` file and select it.

Warning: The file must be named exactly `License_Ruleset.xlsx`. Renaming the file can cause errors during processing in the SAP database.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. Select **Upload** to store the ruleset in the SAP system.
   Verify that a success message is displayed confirming that the ruleset has been stored.

Result

The license ruleset is stored in the SAP system and is available for use by the FUE user classification program. The classification program uses this ruleset to assign each SAP user a target Named User Type during scheduled data collection runs.

What to do next

After uploading the ruleset, establish a trusted HTTPS connection for SAP S/4HANA Cloud, Private Edition. For more information, see Establish a trusted HTTPS connection for SAP S/4HANA Cloud, Private Edition.

Establish a trusted HTTPS connection for SAP S/4HANA Cloud, Private Edition

Export the Root CA certificate from your SAP system and import it into the MID Server's cacerts keystore to establish a trusted HTTPS connection between SAP S/4HANA Cloud, Private Edition and your ServiceNow instance.

Before you begin

- You must have the SAP Basis administrator role with authorization to access transaction STRUST.
- You must have administrator access to your ServiceNow instance to upload the certificate.

Role required: sam_admin, SAP Basis administrator

About this task

Important: This task is required for all SAP S/4HANA Cloud, Private Edition integrations, regardless of whether you use Basic Auth or OAuth 2.0 as the connection type.

The Root CA certificate establishes trust between your SAP system and the ServiceNow OAuth endpoint over HTTPS. Without this certificate, the SAP system can't verify the identity of the ServiceNow server during data collection.

Procedure

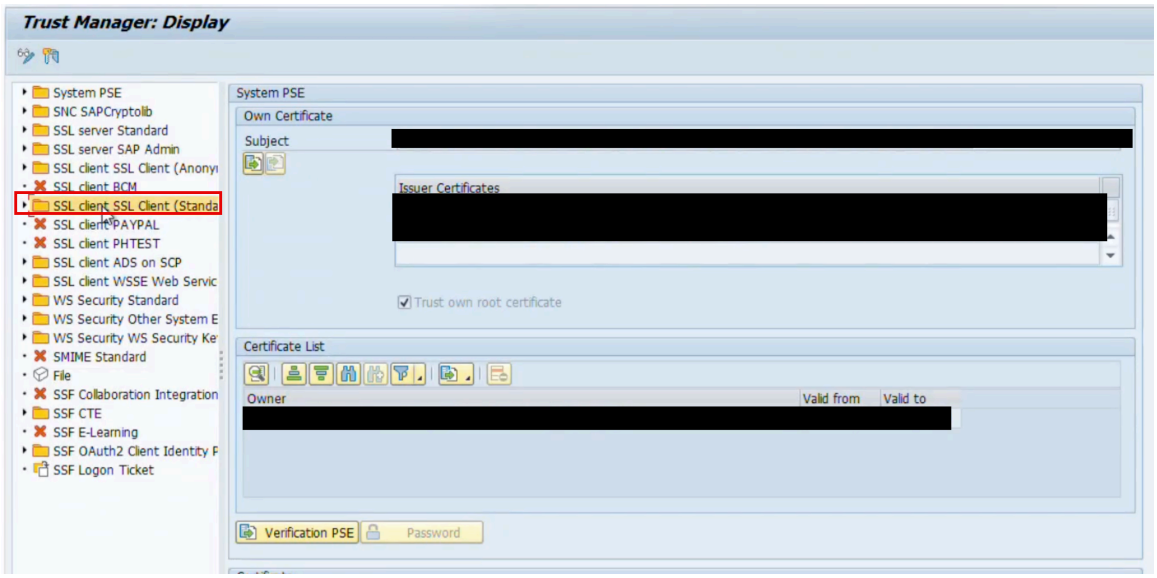
1. Export the certificate from SAP.

   a. Log in to your SAP S/4HANA Private Cloud system using your SAP credentials.

   b. In the command field, enter transaction code `STRUST` and press **Enter**.

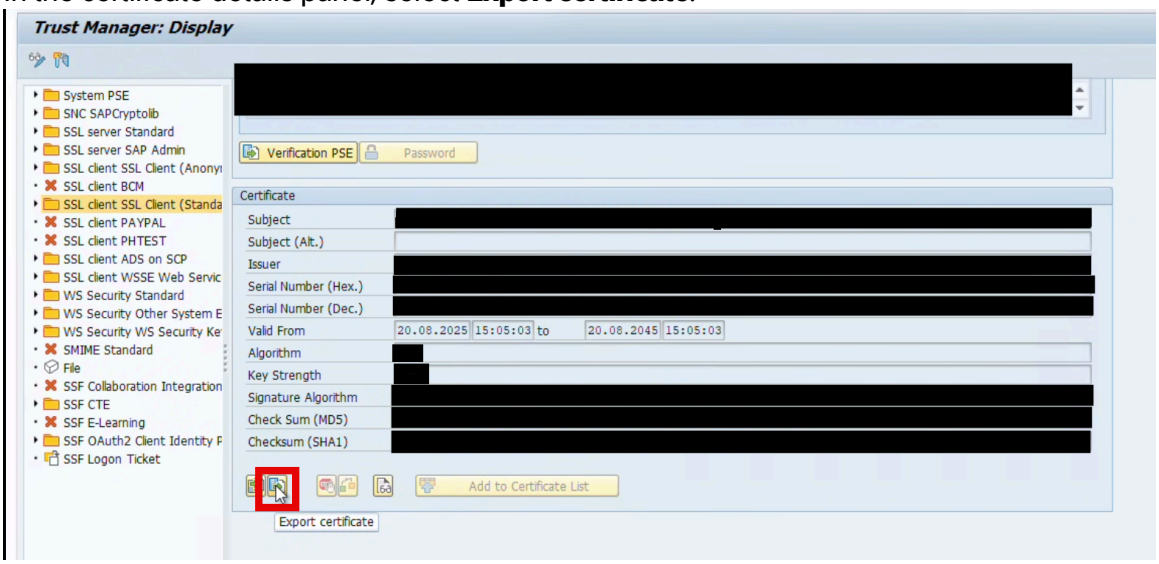
   c. In the Trust Manager, expand **SSL Client (Standard)** in the left navigation panel.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



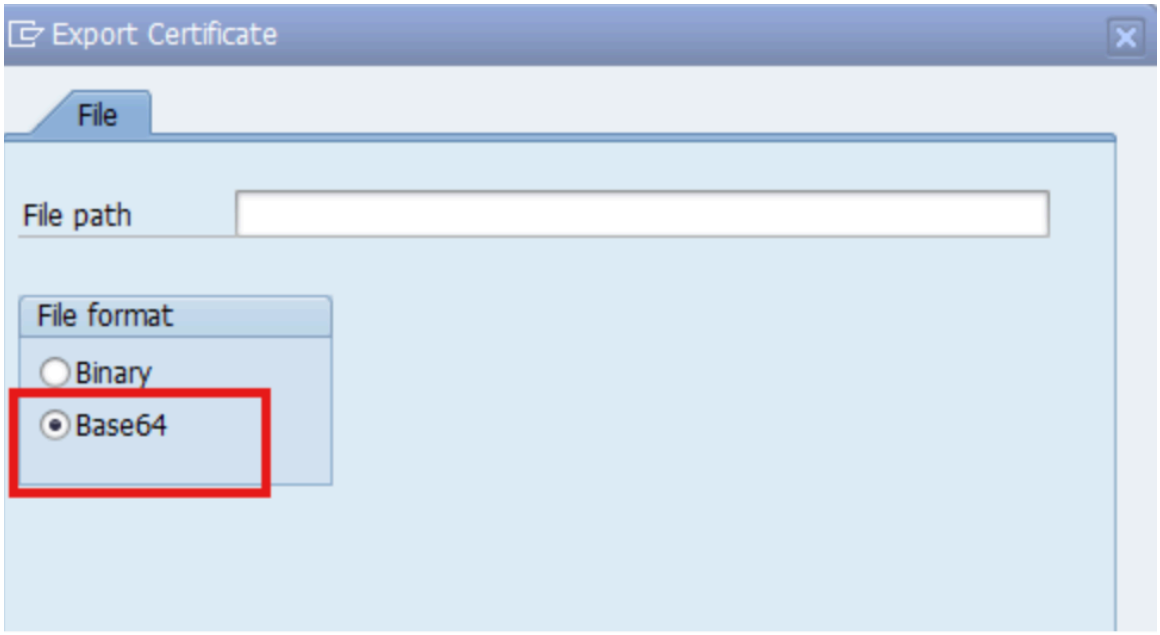
d. Under Issuer Certificates, locate and select the respective Root CA certificate for the ServiceNow domain.

e. In the certificate details panel, select **Export certificate**.



f. In the **Export Certificate** dialog box, select **Base64** as the file format.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



g. Enter a file path and file name for the exported certificate, then select **Save**.
Save the file in a secure location. You will need it to import the certificate into the MID Server's cacerts keystore.

2. Import the certificate into the MID Server's cacerts keystore.
For steps to import, refer to Add SSL certificates for the MID Server.

Result
The Root CA certificate is stored in your ServiceNow instance. The SAP S/4HANA Private Cloud system can now establish a trusted HTTPS connection to your ServiceNow instance during data collection.

What to do next
After uploading the certificate, select SAP clients to import data. For more information, see Select SAP clients to import data.

Select SAP clients to import data

Select the Remote Function Call (RFC) connections that the SAP ABAP program uses to import data from your SAP clients into the central system and then into your ServiceNow instance.

Before you begin
RFC connections must be configured and active in transaction **SM59** before selecting clients. The creation and configuration of RFC connections is a standard SAP Basis procedure performed by the SAP Basis team.

Role required: SAP Basis administrator

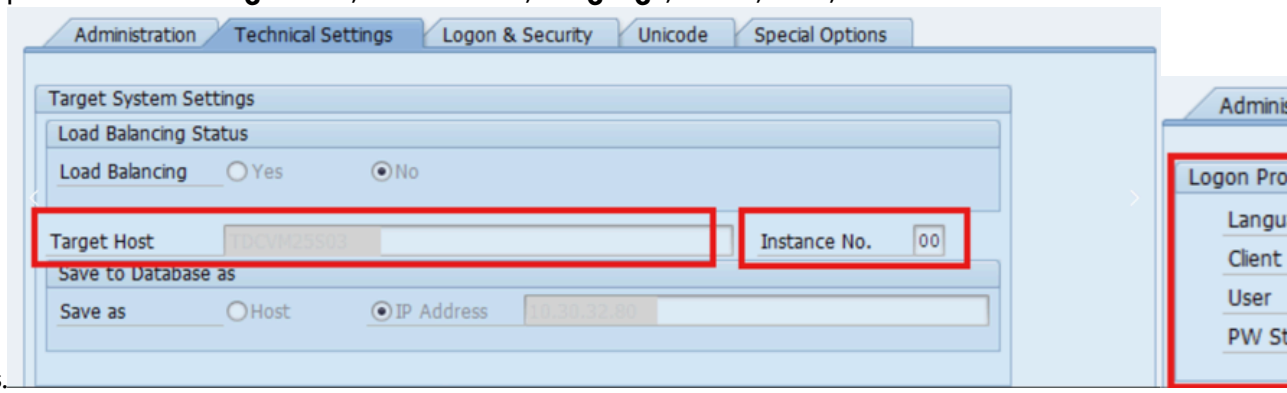
About this task
The Advanced Business Application Programming (ABAP) program is a centralized solution that establishes a connection between your SAP system and your ServiceNow instance. After you import the transport files into an SAP client, then that client becomes the central system. The central system uses RFC connections to connect with all other clients and fetch data into the ServiceNow custom tables.

The central system can be an SAP Solution Manager or any other SAP client with an active RFC connection.

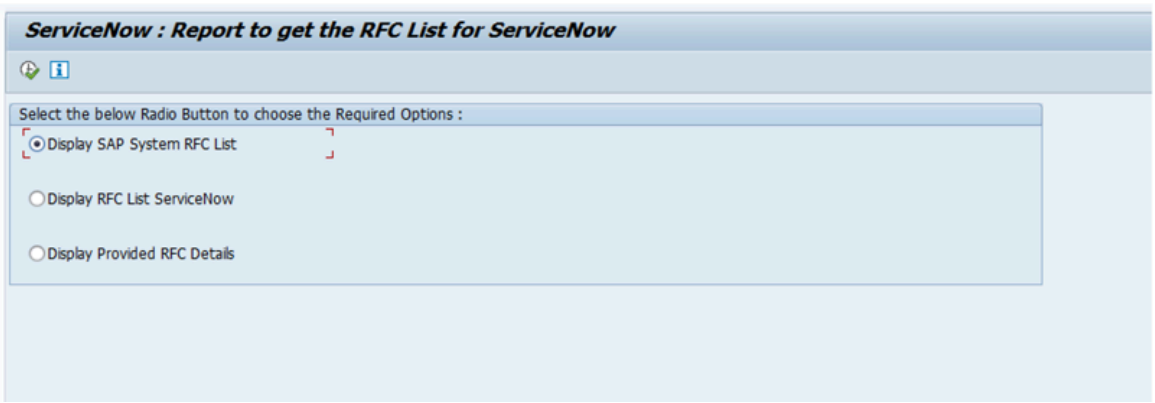
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

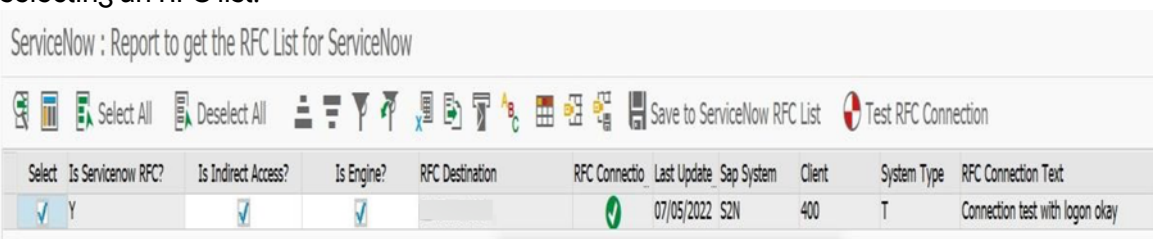
1. Verify that the RFC connection is correctly configured in transaction **SM59**.
   The required fields are **Target Host**, **Instance No.**, **Language**, **Client**, **User**, and **PW Status**.



2. Run the `/NOW/SAMP_RFC_DETAILS` RFC program to select the list of RFC connections that can import data into your ServiceNow instance.
   The RFC program uses only the selected RFC connections to import data from your SAP clients into the central system.



3. If you want indirect access data from that RFC system, then select the **Is Indirect Access?** after selecting an RFC list.



4. Select **Test RFC connection** to verify that the ping test for the RFC connection has passed with a checkmark.
5. Select **Save to ServiceNow RFC List** to store the selected RFCs in the custom RFC table.
   After saving, the RFC is visible under the **Display RFC List ServiceNow** option in the `/NOW/SAMP_RFC` transaction code.

What to do next

Activate the OData services and assign a system alias to support OAuth 2.0 authentication for the integration. For details, see Activate OData services and assign a system alias.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Activate OData services and assign a system alias

Activate the OData services and assign a system alias to support OAuth 2.0 authentication for integration with the Software Asset Management application.

Before you begin

The SAP transport must be imported into the target system before performing this configuration.

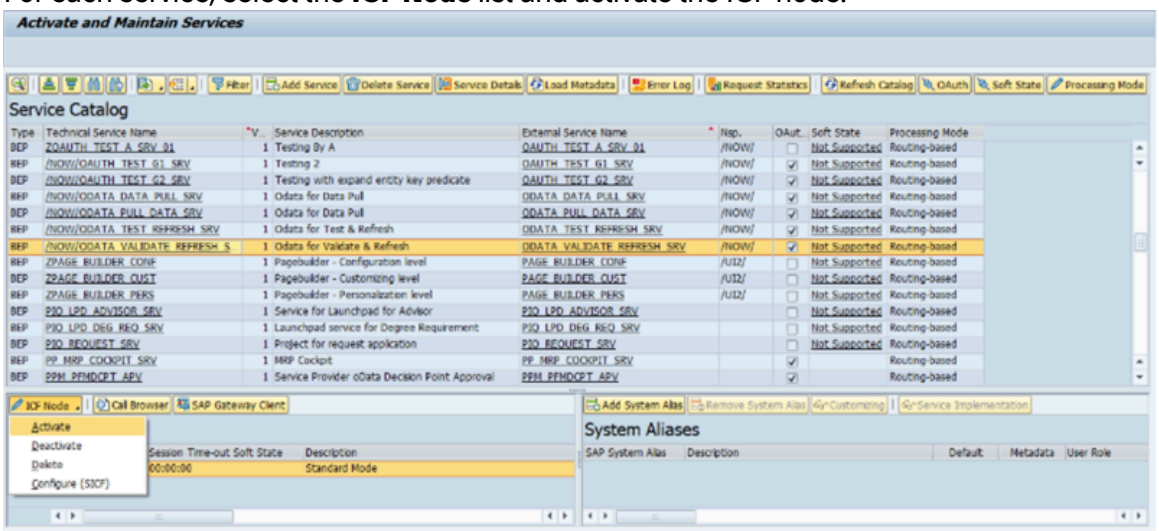
SAP Role required: SAP Basis administrator

About this task

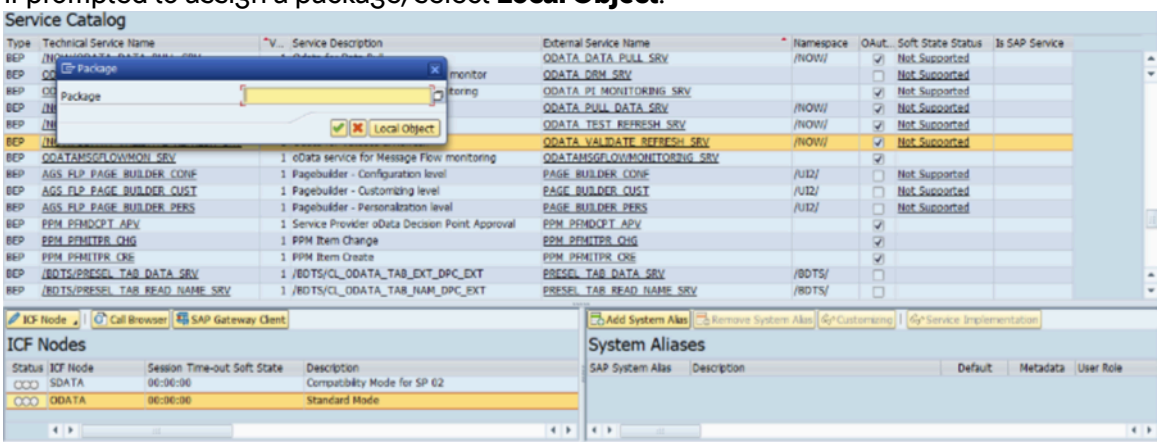
Activate the OData services and assign the system alias to activate and configure the OData services with OAuth support.

Procedure

1. Open transaction code **/n/IWFND/MAINT_SERVICE** in your SAP system.
2. Select the **Find** icon to search for the OData services.
3. Search for and activate each of the following services.
   - `/NOW/ODATA_VALIDATE_REFRESH_SRV`
   - `/NOW/ODATA_PULL_DATA_SRV`
4. For each service, select the **ICF Node** list and activate the ICF node.

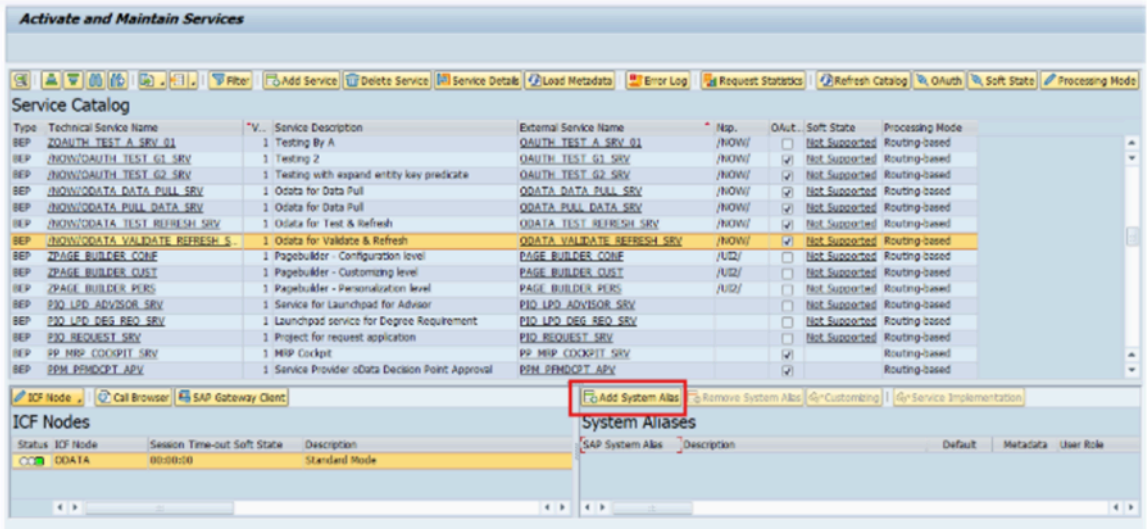


5. If prompted to assign a package, select **Local Object**.



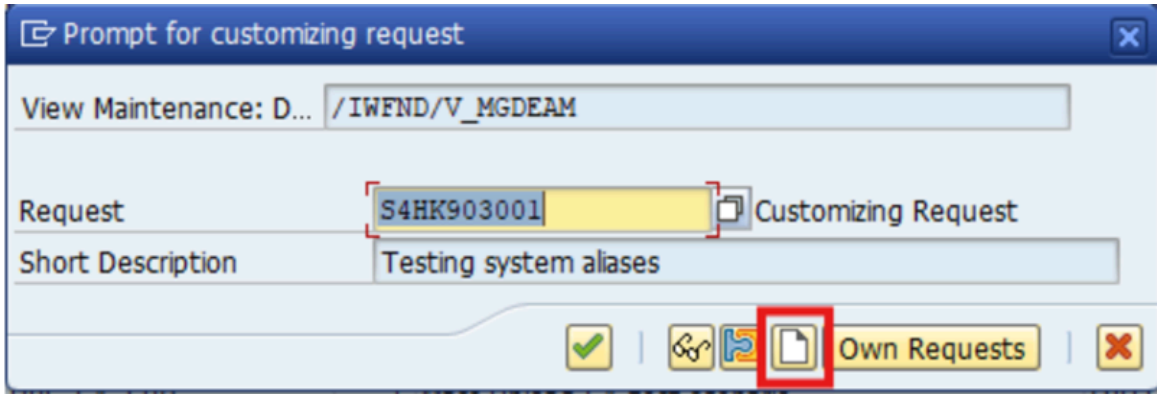
6. For each service, select **Add System Aliases** > **New Entries**.
7. In the **SAP System Alias** column, enter `LOCAL`.

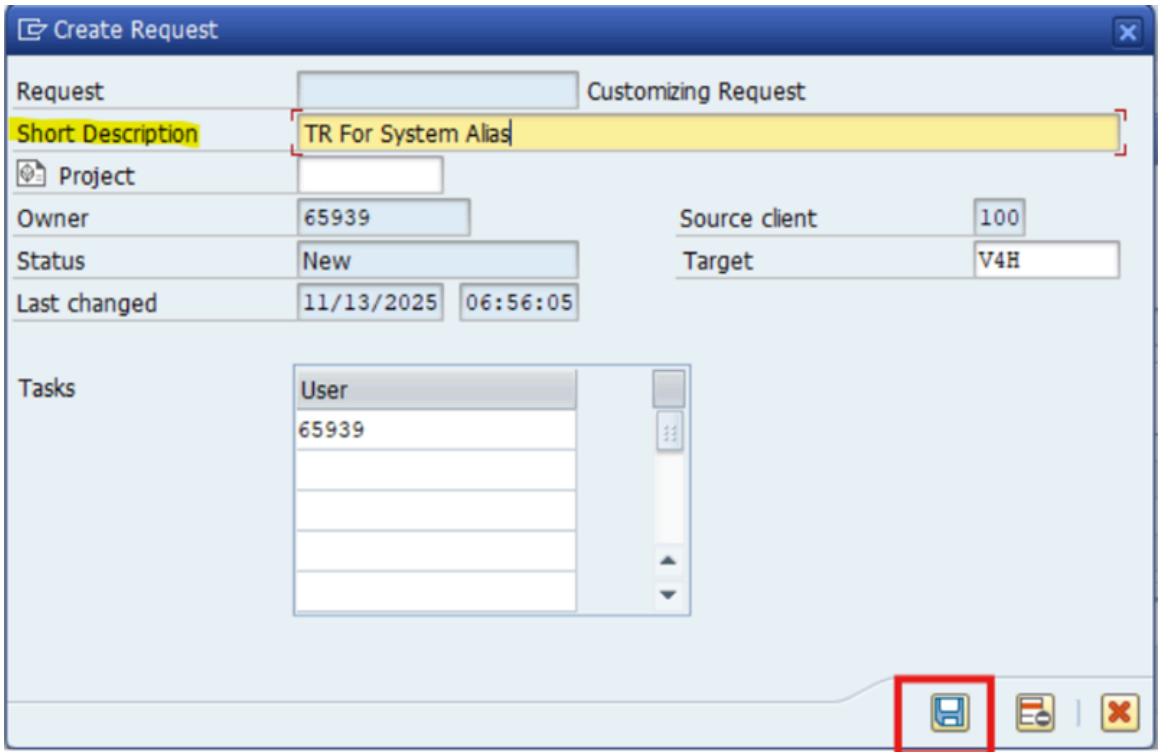
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



8. Select the **Default System** check box.
9. Select **Save**.
   If prompted for a customizing request, select **Create** and enter a suitable description. Select **Save** again to save the entries.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.





Result
The OData services are active and the LOCAL system alias is assigned as the default system for both services.

What to do next
Create a system user for OAuth authentication. For details, see Create a system user for OAuth authentication in SAP.

Create a system user for OAuth authentication in SAP

Create a dedicated system user in SAP to serve as the OAuth 2.0 client ID for the Software Asset Management integration.

Before you begin
The OData services must be activated and the system alias assigned before creating the OAuth system user. See Activate OData services and assign a system alias.

Role required: SAP Basis administrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task
Use transaction code **SU01** to create the system user. The system user is referenced as the OAuth client ID when configuring the OAuth client in the **SOAUTH2** transaction.

Procedure
1. Open transaction code **SU01** in your SAP system and create a user.
   For example, `OAUTH_USER`.
2. Set the **User Type** value to **System**.
3. Generate a password for the user and save it in a secure location.
   This password is required when configuring the OAuth client.
4. Select **Save**.

What to do next
Configure the OAuth client in SAP. For details, see Configure an OAuth client in SAP.

Configure an OAuth client in SAP

Register and configure an OAuth 2.0 client in SAP using the system user created for OAuth authentication, to enable secure data exchange with your ServiceNow instance.

Before you begin
A system user for OAuth authentication must exist in SAP before configuring the OAuth client. For details, see Create a system user for OAuth authentication in SAP.

SAP Role required: SAP Basis administrator

About this task
Use transaction code **SOAUTH2** to register the OAuth client and define the grant types, redirect URI, and scopes required for the integration.

Procedure
1. Open transaction code **SOAUTH2** in your SAP system and select **Create**.
2. In the **Client ID** field, select the system user created for OAuth authentication.
   For example, `OAUTH_USER`. For information on creating a system user, see Create a system user for OAuth authentication in SAP.
3. Enter a description for the OAuth client, then select **Next**.
4. On the Grant Types screen, fill in the fields.

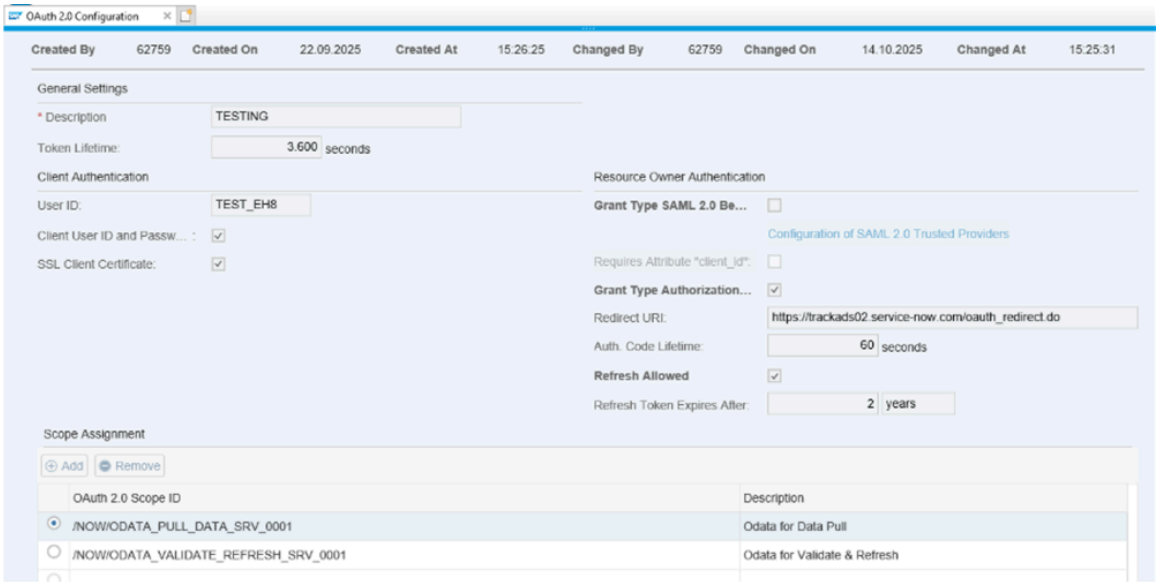
OAuth grant type settings

Field	Value
SAML 2.0 Bearer	Clear this option.
Authorization Code	Select this option.
Redirect URI	The redirect URI for your ServiceNow instance.
Refresh Allowed	Select this option to enable refresh.

5. Select **Next**.
6. Define the following scopes for the OAuth client.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- `/NOW/ODATA_VALIDATE_REFRESH_SRV_0001`
- `/NOW/ODATA_PULL_DATA_SRV_0001`



7. Select **Finish** and then select **Save**.

What to do next

Configure roles and authorizations for the OAuth user. For details, see Configure roles and authorizations for the OAuth user.

Configure roles and authorizations for the OAuth user

Create a role in SAP and assign the required authorization objects to the OAuth system user to support OData service access and background job execution for integration with the Software Asset Management application.

Before you begin

The OAuth client must be configured in SAP before assigning roles to the OAuth user. See Configure an OAuth client in SAP.

SAP Role required: SAP Basis administrator

About this task

Use transaction code **PFCG** to create a role and assign the authorization objects that grant the OAuth user access to OData services, background job scheduling, and OAuth scope management.

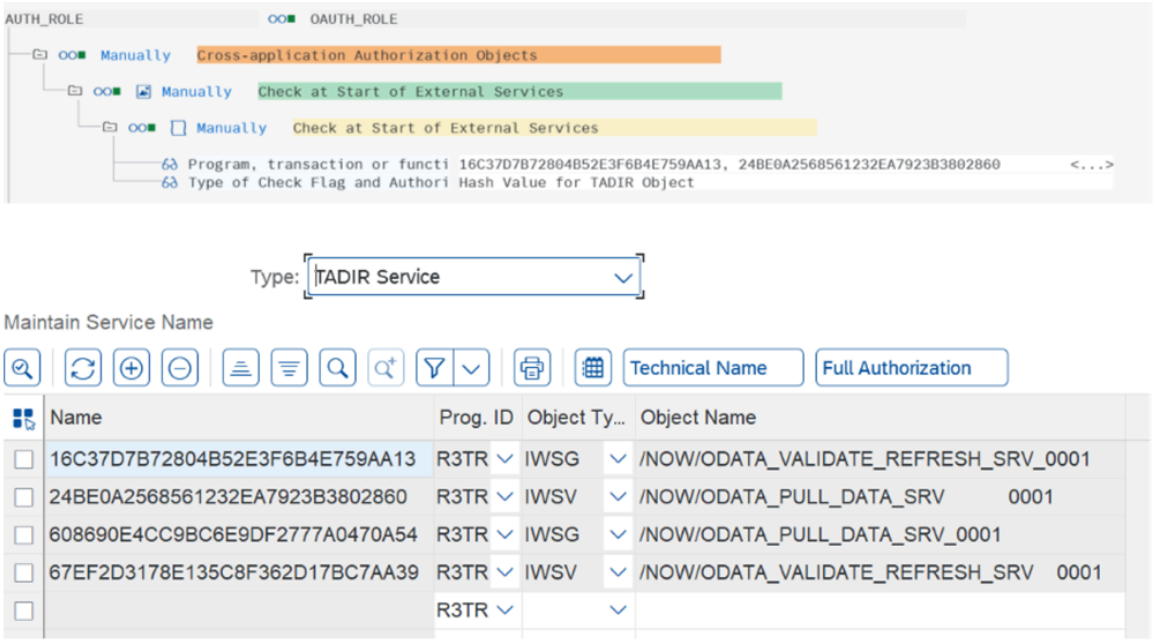
Procedure

1. Open transaction code **PFCG** in your SAP system.

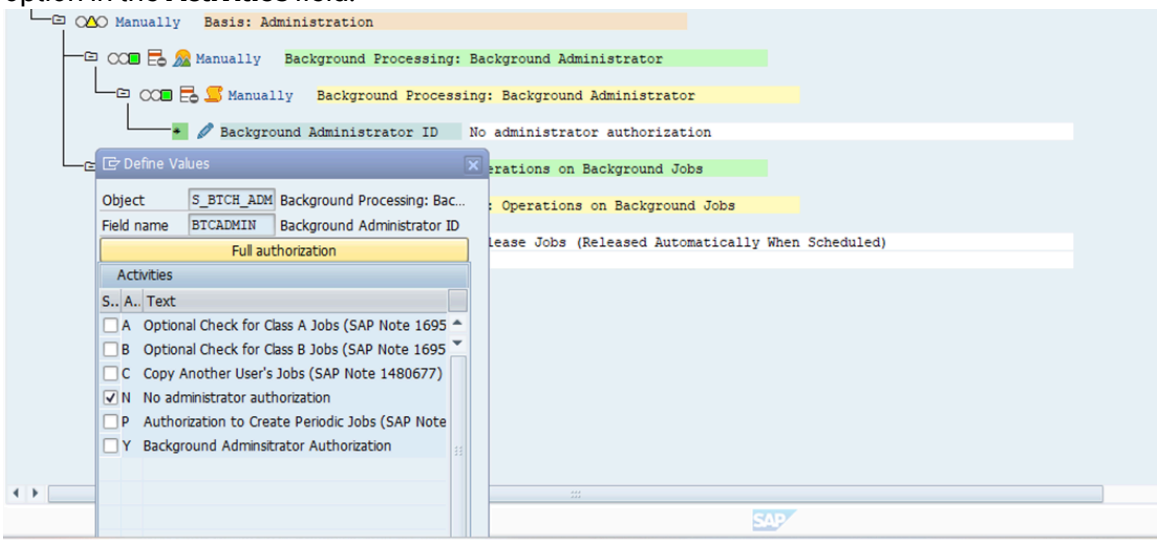
2. Enter a role name in the **Role** field and select **Create Single Role**.
For example, `OAUTH_ROLE`.

3. Add authorization object `S_SERVICE` and select the external service name `TADIR Service` in the **Type** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

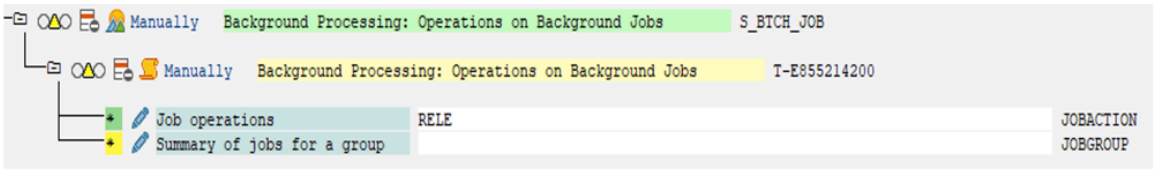


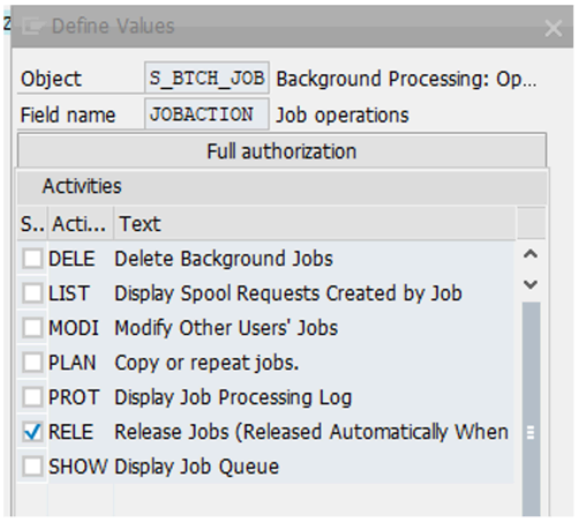
4. Add authorization object S_BTCH_ADM and select the **N (No Administrator Authorization)** option in the **Activities** field.



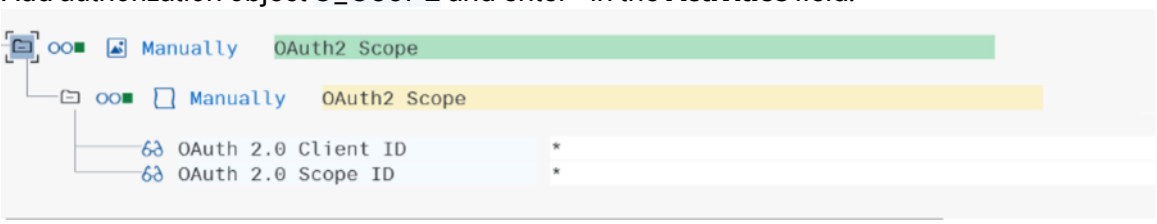
5. Add authorization object S_BTCH_JOB, select **RELE (Release Jobs)** in the **Activities** field, and leave the **JOBGROUP** field empty.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

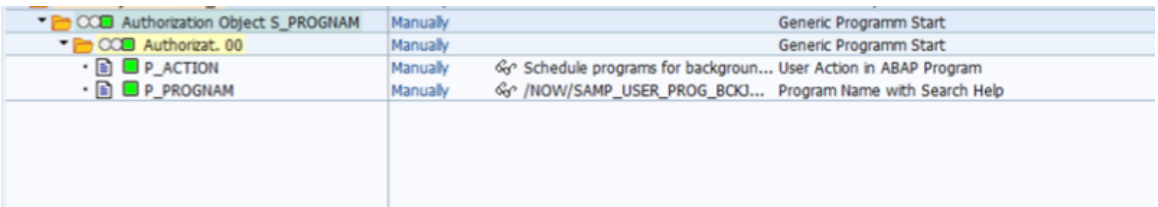




6. Add authorization object `S_SCOPE` and enter * in the **Activities** field.



7. Add authorization object `S_PROGNAM` and the following values in the corresponding fields.
   - **P_ACTION** — `BTCSUBMIT`
   - **P_PROGNAM** — `/NOW/SAMP_USER_PROG_BCKJOB_RUN`



8. Save the role and assign it to the OAuth system user.
   For example, `OAUTH_USER`.

Result

The OAuth user has the required authorizations to access OData services, run background jobs, and manage OAuth scopes for the integration.

What to do next

Create an OAuth 2.0 SAP connection on your ServiceNow instance. For more information, see Establish an SAP connection using OAuth 2.0.

Establish an SAP connection using basic authentication

After you have deployed the Advanced Business Application Programming (ABAP) program in your SAP system, create a connection profile to establish a connection between your SAP system and your ServiceNow instance using basic authentication.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Before establishing a connection between SAP and your ServiceNow instance, check if your SAP system network is accessible to external applications like ServiceNow. If external connections are blocked, you can install a MID Server. A MID Server enables communication and data movement between a ServiceNow instance and external applications or data sources. For instructions, see Installing the MID Server.

If you already have a MID Server installed in the network and connected to your ServiceNow instance, this SAP connection automatically uses it.

Role required: sam_admin

Procedure

1. Navigate to **All** > **SAP Compliance and Optimization** > **Connection Setup** and select **New**.
2. On the form, fill in the fields.

SAP Connection Setup form

Field	Description
Name	Name of connection profile.
Default price list	Default price list that should be considered for reconciliation. **Note:** If connecting to SAP S/4HANA Cloud Private Edition, select **SAP S/4HANA Private Cloud**. For more information, see Price Lists for Private Cloud.
Connection type	Values include: ○ Basic Auth ○ OAuth 2.0 **Important:** The Basic Auth authentication method is planned for deprecation by SAP. You should use the OAuth 2.0 authentication for a secure and compliant integration. For more information, see Establish an SAP connection using OAuth 2.0.
WSDL	Web Service Description Language (WSDL) URL from the SOA manager that includes an IP address that is used to connect to the SAP system. This is the same value that you generated in the Create a WSDL for the SAP service definition procedure. **Note:** Don't change the SAP WSDL name. The WSDL service definition name must be /NOW/SAMP and the service binding name must be NOW_SAMP. The only WSDL name that can be changed is the WSDL generation name.
User name	User name used to connect to the SAP system.
Password	Password used to connect to the SAP system.

3. Select **Submit**.
   The initial connection is established.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Select the SAP connection and review the fields on the record.

SAP Connection record

Field	Description
Name	Name of the connection profile. The value is generated in the SAP Connection Setup form.
Default price list	Default price list that should be considered for reconciliation. The value is generated in the SAP Connection Setup form.
Use USMM Role Optimization	The option to specify USMM role-based optimization that must be applied during reconciliation.
Last run	Date and time when the data was last pulled for the SAP connection.
SOAP message	SOAP message that has the SAP WSDL information.
Credential alias	Connection alias that contains the credentials for the connection. The connection alias resolves your connection and credentials at runtime.
Active	Option that indicates that the SAP connection is active.
Connection type	This field is automatically populated based on your connection type.
User Mapping	
SAP user field	SAP users across different clients that are mapped to a corresponding ServiceNow user.
User field	ServiceNow user field. **Note:** Changing the values in the User Mapping fields after data is pulled results in the loss of the mapping between discovered users and system users. The mapping between discovered users and the **Rights used by** and **Rights needed by** fields is also lost.
Configuration	
Fetch roles	Controls the data pull from SAP for roles data.
Fetch engine usage	Controls the data pull from SAP for engine usage data.
Fetch digital access usage	Controls the data pull from SAP for digital access usage data.
Fetch activity	Controls the data pull from SAP for user activity and web activity data.
Fetch user transactions	Controls the data pull from SAP for user transaction activity data.

5. View the credentials that you used to create the connection in the SAP Credentials related list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Only one credential record should be active for a given SAP connection. To determine the roles associated with your credentials, contact your SAP Basis administrator. Your administrator assigns respective roles to your SAP user ID credentials.

6. If you're running the latest version of the ABAP program, test your SAP connection by selecting the **Test SAP Connection and Version** related link.

   Note: If you upgrade your ServiceNow instance, you must download and deploy the new version of the ABAP program and reconfigure a service provider with the SOA Manager.

7. Send a request to the custom ABAP program to collect the SAP data into the custom tables again by selecting the **Refresh data in SAP** related link.
8. If the SAP data you pulled is corrupted, you can view current data by selecting the **Pull all SAP Data to ServiceNow** related link.
   SAP data is scheduled to be pulled regularly.
9. Update connection information or switch to a different authentication method by selecting the **Update connection** related link.
   a. In the Update Connection dialog box, select the authentication method.
   b. Enter the connection details based on the authentication method that you select.
   c. Select **Submit**.
10. View SAP clients in the **SAP Clients** related list.
    The SAP clients are generated when SAP data is pulled during the scheduled job.
11. Select **Update**.

Result

You can start creating software models and entitlements.

Establish an SAP connection using OAuth 2.0

Create a connection profile to establish a connection between your SAP system and your ServiceNow instance using OAuth 2.0 authentication.

Before you begin

Before establishing a connection between SAP and your ServiceNow instance, make sure that the following conditions are met:

- Verify if your SAP system network is accessible to external applications like ServiceNow.
- If external connections are blocked, install a MID Server. A MID Server enables communication and data movement between a ServiceNow instance and external applications or data sources. For instructions, see Installing the MID Server.

If you already have a MID Server installed in the network and connected to your ServiceNow instance, this SAP connection automatically uses it.

Role required: sam_admin

Procedure

1. Navigate to **All** > **SAP Compliance and Optimization** > **Connection Setup** and select **New**.
2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SAP Connection Setup form

Field	Description
Name	Name of connection profile.
Default price list	Default price list that should be considered for reconciliation. **Note:** If connecting to SAP S/4HANA Cloud Private Edition, select **SAP S/4HANA Private Cloud**. For more information, see Price Lists for Private Cloud.
Connection type	Values include: ○ Basic Auth ○ OAuth 2.0
Connection URL	The base URL to connect to the SAP instance.
OAuth Client ID	Client ID for your SAP connection.
OAuth Client Secret	Client secret for your SAP connection.

Note: You can get the OAuth Client ID and Client Secret at the time of registering your SAP application.

3. Select **Submit**.
   The initial connection is established.
4. Select the SAP connection and review the fields on the record.

SAP Connection form

Field	Description
Name	Name of the connection profile. The value is generated in the SAP Connection Setup form.
Default price list	Default price list that should be considered for reconciliation. The value is generated in the SAP Connection Setup form.
Use USMM Role Optimization	The option to specify USMM role-based optimization that must be applied during reconciliation.
Last run	Date and time when the data was last pulled for the SAP connection.
REST message	REST message that contains the SAP API information.
OAuth entity profile	The OAuth entity profile that contains the credentials for the connection.
Active	Option that indicates that the SAP connection is active.
Connection type	This field is automatically populated based on your connection type.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
User Mapping	
SAP user field	SAP users across different clients that are mapped to a corresponding ServiceNow user.
User field	ServiceNow user field. **Important:** Changing the values in the User Mapping fields after data is pulled results in the loss of the mapping between discovered users and system users. The mapping between discovered users and the **Rights used by** and **Rights needed by** fields is also lost.
Configuration	
Fetch roles	Controls the data pull from SAP for roles data.
Fetch engine usage	Controls the data pull from SAP for engine usage data.
Fetch digital access usage	Controls the data pull from SAP for digital access usage data.
Fetch activity	Controls the data pull from SAP for user activity and web activity data.
Fetch user transactions	Controls the data pull from SAP for user transaction activity data.

5. Generate an access token by selecting the **Get OAuth Token** related link.

   Note: You must be in the local network of SAP to generate the access token.

   a. Log in using your SAP credentials.

   b. In the Access Permission Request dialog box, select **Allow** for the scopes that you had added during the application registry.
   A message is displayed on the SAP Connection form indicating that the OAuth refresh token is available.

6. If you're running the latest version of the ABAP program, test your SAP connection by selecting the **Test SAP Connection and Version** related link.

   Note: If you upgrade your ServiceNow instance, you must download and deploy the compatible version of the ABAP program and reconfigure a service provider with the SOA Manager.

7. Send a request to the custom ABAP program to collect the SAP data into the custom tables again by selecting the **Refresh data in SAP** related link.
8. If the SAP data you pulled is corrupted, view current data by selecting the **Pull all SAP Data to ServiceNow** related link.
   SAP data is scheduled to be pulled regularly.
9. **Optional:** Update connection information by selecting the **Update connection** related link.
10. Select **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

11. View SAP clients in the **SAP Clients** related list.
    The SAP clients are generated when SAP data is pulled during the scheduled job.
12. Select **Update**.

Result
The SAP connection is established.

What to do next
You can start creating software models and entitlements.

Create software models for SAP

Create software models to record SAP product information.

Before you begin
Role required: sam_user

Important: You can create software models in both the Software Asset Management Core UI and Software Asset Workspace. These steps provide details on creating software models in the Software Asset Management Core UI application. For details on creating software models in Software Asset Workspace, see Create a software model in the Software Asset Workspace.

About this task
Software models are automatically created for engines and license metrics that are pulled from your SAP systems. You can manually create additional software models for SAP products as needed.

The following steps describe information that is specific to SAP. For general instructions on creating software models, see Create software models in Software Asset Management classic.

Note: For SAP S/4HANA Cloud, Private Edition, create a software model with the **Product** field set to **SAP S/4 HANA** and the **Edition** field set to **Cloud Private**. SAP system users from a Private Cloud deployment are associated with this software model for Full Usage Equivalent (FUE) license calculation.

Procedure
1. Navigate to the software model.

Interface	Action
Core UI	**a.** Navigate to **All** > **Product Catalog** > **Product Models** > **Software Models**. **b.** Select **New**.
Software Asset Workspace	**a.** Navigate to **Workspaces** > **Software Asset Workspace** > **License operations** > **Software models**. **b.** Select **New**.

2. On the form, fill in the fields.

Note: Only the fields that are specific to SAP software models are shown. For detailed descriptions of all software model fields, see Software model fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Model form

Field	Description
Named user type	SAP named user type. **Note:** This field appears only when **Named Users** is selected from the **Product** field.
Price List	Software group that corresponds to the named user type. **Note:** This field appears only when **Named Users** is selected from the **Product** field.
SAP license metric	License metric that is used to calculate license consumption for an engine. Examples of license metrics are number of employees or number of contracts. **Note:** This field appears only when an SAP engine is selected from the **Product** field.
Is relevant	Some SAP engines don't require additional licensing. Select the check box if the engine requires additional licensing. Software models with **Is relevant** set to false will always be considered compliant by reconciliation. **Note:** This field appears only when an SAP engine is selected from the **Product** field.
Threshold	Some SAP engines allow a certain amount of unlicensed usage before your licence position becomes not compliant. The threshold defines the allowed usage and is specific to each engine and license metric. If your engine usage exceeds your licensed amount but is less than the threshold value, the software model is still considered compliant by reconciliation. **Note:** This field appears only when an SAP engine is selected from the **Product** field.

3. Select **Submit**.

What to do next

Create a software entitlement to record your licenses for the software model.

Create entitlements for SAP

Create software entitlements to record your license information for SAP products. You can create entitlements individually or import them from a spreadsheet.

Before you begin

Role required: sam_user or sam_admin

Note: The sam_admin role is required to import entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You can create software entitlements in both the Software Asset Management Core UI and Software Asset Workspace. These steps provide details on creating software entitlements in the Software Asset Management Core UI application. For details on creating software entitlements in Software Asset Workspace, see Import bulk entitlements in workspace.

Procedure

1. Navigate to the software entitlements.

Interface	Action
Core UI	**a.** Navigate to **All** > **Asset** > **Portfolios** > **Software Entitlement**. **b.** Select **New**.
Software Asset Workspace	**a.** Navigate to **Workspaces** > **Software Asset Workspace** > **License operations** > **Software entitlements**. **b.** Select **New**.

2. On the form, fill in the fields.

Note: Only information specific to SAP software entitlements is shown in the table. For a detailed description of all software entitlement fields, see Software entitlement fields.

Software Entitlement form

Field	Value
Metric group	SAP
License metric	Select any of the following values: ○ **Named User**: To license the number of named users that can be assigned a given Named User Type. The Named User Type is defined by the software model linked to the entitlement. ○ **Engine Measurement**: To license the amount of usage for an SAP engine. ○ **Digital Access**: To license the indirect usage of SAP applications through a third-party application or a non-SAP intermediary software based on the count of documents created by the third-party application. ○ **User Subscription**: To license the number of users that are authorized to access specified solution capabilities of SAP S/4HANA Cloud, Public Edition. A user subscription can be allocated to different user types with a specific weighting factor.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	Note: In releases earlier than Brazil, this license metric was named **Full Usage Equivalent**. When you upgrade, existing software entitlements that used the **Full Usage Equivalent** metric for SAP S/4HANA Cloud, Public Edition are updated automatically to use the **User Subscription** metric. ○ **Full Usage Equivalent**: To license the number of users that are authorized to access specified solution capabilities of SAP S/4HANA Cloud, Private Edition. Full Usage Equivalent (FUE) can be allocated to different user types with a specific weighting factor. When you select **User Subscription** in the **License metric** field, the license type is automatically set to **Subscription**. The type of usage is defined by the **SAP license metric** field on the software model. For more information about license metrics, see Software license metrics.
The following fields appear when you select **Engine measurement** in the **License metric** field.	
Rights per license pack	Number of rights associated with each pack that is purchased for SAP Engine product.
Number of packs	Number of packs for SAP Engine measurement licenses.

3. Select **Save**.
4. After the form reloads, select **Publish**.

Related topics

Create entitlements in Software Asset Management classic

Create a custom SAP named user type

Create a custom SAP named user type so that you can track and manage your SAP licenses based on the named user type that is specific to your SAP system.

Before you begin
Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You can create custom SAP named user types in both the Software Asset Management classic application and the Software Asset Workspace. Use the following steps to create custom named SAP user types in the Software Asset Management classic application. For details on how to create custom named user types in the Software Asset Workspace, see Create a custom named user type in workspace.

About this task

Note: The custom SAP named user types that you create directly on your ServiceNow instance are not reflected in your SAP system. You must make the same changes in your SAP system.

Procedure

1. On the page header of your ServiceNow® instance, select **All**.
2. In the menu navigation filter, enter `samp_named_user_type_list.do`.
   The Named User Types [samp_named_user_type] table opens.
3. Select **New**.
4. On the form, fill in the fields.

Custom Named User Type form

Field	Description
Name	Name of custom named user.
Price list	Default price list.
Is developer	Option that indicates the user has a developer role.
Grants access to	Grant access to a named user type.
Value	Value associated with the named user type. This value can be either numbers or letters.
Rank	Priority of the named user type during reconciliation. Lower rank values take precedence.
Is licensable	Option that indicates the named user type license status.
Active	Option that indicates if the named user type is active.

5. Select **Submit**.

Result

The named user type is added to the Named User Types [samp_named_user_type] table.

What to do next

After you have added the custom named user, create a software model designating the custom named user in the form.

Map a role to a named user type

You can optimize your SAP licenses by mapping roles to a named user type. During reconciliation, discovered user roles and their assigned named user types are compared against these roles to identify user that can be given a lower named user type.

Before you begin

Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Procedure

1. On the page header of your ServiceNow® instance, select **All**.
2. In the menu navigation filter, enter `samp_named_user_type_list.do`.
   The Named User Types [samp_named_user_type] table opens.
3. Select the named user type that you want to map a role to.
4. In the **SAP Roles** related list, select **Edit...**.
5. In the Collection list on the Edit Members form, search for and select the role that you want to map to the named user type.
6. Select the Add icon  to move the selected role to the SAP Roles List.
7. Repeat steps 5 and 6 for each role that you want to map to the named user type.
8. Select **Save**.

Create custom SAP price lists

Create custom SAP price lists so that you can track and manage SAP licenses based on the contracts that are specific to your SAP system.

Before you begin

Role required: sam_admin

Note: The custom SAP named user types that you create directly on your ServiceNow instance aren't reflected in your SAP system. You must make the same changes in your SAP system.

Important: You can create custom SAP price lists in both the Software Asset Management classic application and the Software Asset Workspace. Use the following steps to create custom SAP price lists in the Software Asset Management classic application. For details on how to create custom SAP price lists in the Software Asset Workspace, see Create custom SAP price lists in workspace.

Procedure

1. On the page header of your ServiceNow instance, select **All**.
2. In the menu navigation filter, enter `samp_price_list_list.do`.
   The Price Lists [samp_price_list] table opens.
3. Select **New**.
4. On the form, fill in the fields.

Custom Price List form

Field	Description
Name	Name of the price list.
Id	Unique identifier for the price list.
Default named user type	Default named user type for the price list.
Active	Option that indicates if the price list is active.

5. Select **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You automatically return to the Price Lists [samp_price_list] table.

6. **Optional:** Associate SAP named user types with the custom SAP price list.

   a. From the Price Lists [samp_price_list] table, select the custom SAP price list that you created. The Custom Price List record opens.

   b. In the **Named User Types** related list, select **New**.

   c. On the form, fill in the fields.

Create Custom Named User Type form

Field	Description
Name	Name of the named user type.
Price List	Price list that you want to associate the named user type with. This field populates automatically.
Is developer	Option that indicates if users with this named user type have a developer role.
Grants access to	Applications that the named user type has access to.
Value	Alphanumerical value that identifies the named user type.
Rank	Priority of the named user type during reconciliation. Lower rank values correlate with a higher priority during reconciliation.
Is licensable	Option that indicates if the named user type can be licensed.
Active	Option that indicates if the named user type is active.

   d. Select **Submit**.

   e. Repeat steps a to c for each custom named user type that you want to add.

Import custom SAP named user types

Import custom SAP named user types into your ServiceNow® instance so that you can track and manage SAP licenses based on the named user types that are specific to your SAP system.

Before you begin

Role required: admin

Procedure

1. Go to KB1299127 to download the Microsoft Excel spreadsheet template (imp_samp_sap_custom_nut.xlsx) that you can use to import custom SAP named user types into your ServiceNow instance.
2. Fill in the spreadsheet with all the custom SAP named user types that you want to import. The **Client**, **System**, **Named user type value**, and **Named user type name** fields are required for every entry on the spreadsheet.
3. From your ServiceNow instance, open the SAP Custom Named User Types [imp_samp_sap_custom_nut] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The Application Scope of your ServiceNow instance must be set to **Software Asset Management Professional for SAP**.

a. On the page header of your ServiceNow® instance, select **All**.

b. In the menu navigation filter, enter `imp_samp_sap_custom_nut_list.do`.
The SAP Custom Named User Types [imp_samp_sap_custom_nut] table opens.

4. Right-click the table header and then select **Import**.
5. On the form, fill in the fields.

Import external data into SAP Custom Named User Type form

Field	Description
Do you want to insert or update data?	Option that indicates whether you're inserting new data or updating existing data in the SAP Custom Named User Types [imp_samp_sap_custom_nut] table.
Do you want to create an Excel template to enter data?	Option to generate the Microsoft Excel spreadsheet template that you can use to insert or update data in the SAP Custom Named User Types [imp_samp_sap_custom_nut] table. Enable this option only if didn't already download the spreadsheet template in step 1.
Step 1: Create an Excel template file to enter data **Note:** This form section appears only when you enable the **Do you want to create an Excel template to enter data?** option.	
Include all fields in the template	Option to include all available fields in the Microsoft Excel spreadsheet template.
Create Excel Template	Option to generate the Microsoft Excel spreadsheet template.
Step 2: Upload the template file	
Excel template file	Microsoft Excel spreadsheet that contains the named user types that you want to insert or update in the SAP Custom Named User Types [imp_samp_sap_custom_nut] table.

6. Select **Upload**.
7. On successful upload, select **Preview Imported Data**.
The Imp Tmpl Samp Sap Custom Nuts page opens.
8. Verify that the correct number of custom SAP named user types were uploaded and then select **Complete Import**.
The custom SAP named user types are imported into your ServiceNow® instance. The named user types are then added to the Named User Types [samp_named_user_type] table.

Import custom SAP price lists

Import custom SAP price lists into your ServiceNow® instance so that you can track and manage SAP licenses based on the contracts that are specific to your SAP system.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: admin

Procedure

1. Go to KB1299127 to download the Microsoft Excel spreadsheet template (imp_samp_sap_custom_price_list.xlsx) that you can use to import custom SAP price list data into your ServiceNow instance.
2. Fill in the spreadsheet with all the custom SAP price list data that you want to import. The **Client**, **System**, and **Price list value** fields are required for every entry on the spreadsheet.

   Note: You must fill in a separate spreadsheet for each custom SAP price list that you want to import data for.

3. From your ServiceNow instance, open the SAP Custom Price List Data [imp_samp_sap_custom_price_list] table.

   Note: The Application Scope of your ServiceNow instance must be set to **Software Asset Management Professional for SAP**.

   a. On the page header of your ServiceNow instance, select **All**.

   b. In the menu navigation filter, enter `imp_samp_sap_custom_price_list_list.do`. The SAP Custom Price List Data [imp_samp_sap_custom_price_list] table opens.

4. Right-click the table header and then select **Import**.
5. On the form, fill in the fields.

Import external data into SAP Custom Price List Data form

Field	Description
Do you want to insert or update data?	Option that indicates whether you're inserting new data or updating existing data in the SAP Custom Price List Data [imp_samp_sap_custom_price_list] table.
Do you want to create an Excel template to enter data?	Option to generate the Microsoft Excel spreadsheet template that you can use to insert or update data in the SAP Custom Price List Data [imp_samp_sap_custom_price_list] table. Enable this option only if you didn't already download the spreadsheet template in step 1.
Step 1: Create an Excel template file to enter data **Note:** This form section appears only when you enable the **Do you want to create an Excel template to enter data?** option.	
Include all fields in the template	Option to include all available fields in the Microsoft Excel spreadsheet template.
Create Excel Template	Option to generate the Microsoft Excel spreadsheet template.
Step 2: Upload the template file	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Excel template file	Microsoft Excel spreadsheet that contains the data that you want to insert or update in the SAP Custom Price List Data [imp_samp_sap_custom_price_list] table.

6. Select **Upload**.
7. On successful upload, select **Preview Imported Data**.
   The Imp Tmpl Imp Samp Sap Custom Price Lists page opens.
8. Verify that the correct number of entries were uploaded for your custom SAP price list and then select **Complete Import**.
   The data for your custom SAP price list is imported into your ServiceNow instance. The price list is then added to the Price Lists [samp_price_list] table.
9. **Optional:** Associate your custom SAP price list with additional SAP named user types.
   By default, the Software Asset Management application automatically associates your custom SAP price list with the SAP named user types that you specified in the imported Microsoft Excel spreadsheet. However, you can associate your price list with additional SAP named user types by adding custom named user types to it.

   a. On the page header of your ServiceNow instance, select **All**.

   b. In the menu navigation filter, enter `samp_price_list_list.do`.
      The Price Lists [samp_price_list] table opens.

   c. Select your custom SAP price list.
      The Price List record opens.

   d. In the **Named User Types** related list, select **New**.

   e. On the form, fill in the fields.

Custom Named User Type form

Field	Description
Name	Name of the named user type.
Price List	Price list that you want to associate the named user type with. This field populates automatically.
Is developer	Option that indicates if users with this named user type have a developer role.
Grants access to	Applications that the named user type has access to.
Value	Alphanumerical value that identifies the named user type.
Rank	Priority of the named user type during reconciliation. Lower rank values correlate with a higher priority during reconciliation.
Is licensable	Option that indicates if the named user type can be licensed.
Active	Option that indicates if the named user type is active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

f. Select **Submit**.

g. Repeat steps d to f for each custom named user type that you want to add.

SAP USMM-based optimization

Optimize licensing through SAP User License Measurement (USMM) rules that map roles to the Named User Type for an SAP client.

The rules in the SAP USMM map roles to a Named User Type on a system client basis. If you want to apply these rules for named user licensing, ServiceNow AI Platform pulls the USMM rules and stores all information in the SAP USMM Rules [samp_sap_usmm_rule] table. A scheduled job, *SAM - SAP USMM Based Optimization*, runs weekly to maximize licensing according to the USMM rules of a system client for the discovered user. This optimized Named User Type is populated in the USMM Named user type column in the SAP System Users [samp_sap_system_user] table. For more information, see Tables installed with the SAP publisher pack.

If you opt in for the USMM rules by selecting the **Use USMM Role Optimization** check box in the SAP Connection record, the Software Asset Management application prefers the optimized USMM Named User Type during reconciliation. For more information about creating a connection profile to establish a connection between your SAP system and your ServiceNow instance, see Establish an SAP connection using basic authentication.

User transaction activity for named user types

Determine license optimizations for your SAP named user types based on your SAP user transaction activity.

User transaction activities are the transactions or tasks that users perform on an SAP client. These activities are based on SAP transaction codes (t-codes), which are the shortcuts that enable you to identify and perform these transactions or tasks. When you run scheduled jobs for SAP, the Software Asset Management application retrieves the SAP transaction codes that were actively used by your SAP users.

When you create a reclamation rule for an SAP named user type, you can specify the transaction codes and the minimum number of those transaction codes that must be active for a user to keep their assigned named user license. During reconciliation, the Software Asset Management application compares these transaction codes against the discovered user transaction codes for the named user type. You can view the resulting data in the Users for Transaction Based License Optimization report on the Software Publisher Analytics dashboard for SAP. Use this information to optimize your named user license position by downgrading licenses or reclaiming unused licenses. See Software Publisher Analytics dashboard for SAP in Software Asset Management classic for more information on this report.

View active transaction codes for your SAP users

View the SAP transaction codes (t-codes) that were actively used by your SAP users. This list is compared against your reclamation rules to determine whether the user is assigned an optimized license.

Before you begin

Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You can view these SAP transaction codes in both the Software Asset Management classic application and the Software Asset Workspace. The following steps provide details on viewing these transaction codes in the Software Asset Management classic application. For details on viewing these transaction codes in the Software Asset Workspace, see View SAP users in workspace.

Procedure

1. On the page header of your ServiceNow® instance, select **All**.
2. In the menu navigation filter, enter `samp_sap_system_user_list.do`.
   The SAP System Users [samp_sap_system_user] table opens.
3. Select the SAP user that you want to view active SAP transaction codes for.
4. On the SAP System User record, select the **SAP User Active Transactions** related tab to view the complete list of SAP transaction codes that were discovered for the given user.

Self-declaring SAP engine license usage

You can self-declare the license usage for any SAP engines that cannot be measured by the automated SAP engine measurement process. Use this information to gain more comprehensive visibility into your SAP license compliance position so that you can optimize your licensing costs.

Self-declare SAP engine license usage in the Software Asset Management classic application

Use the Software Asset Management classic application to self-declare the license usage for any SAP engines that cannot be measured by the automated SAP engine measurement process.

Before you begin

Role required: sam_user

About this task

To determine if you must self-declare the license usage for a given engine, see Engine & Self-Declaration Product Measurement in the SAP Support Portal. You must self-declare the license usage for any engine that is included in the list of Self-Declaration Products.

Important: You must have an SAP Support Portal account to access the SAP Support Portal.

Procedure

1. Create a software model for the SAP engine.
   Refer to Create software models for SAP for detailed instructions.

   Note:

   On the Software Model form, you must set the **Publisher** field to SAP. The form then reloads with only the software model fields that are applicable to SAP.

   In addition, you must set the **Product** field to the SAP engine that you want to self-declare the license usage for.

2. Create entitlements for your software model.
   Refer to Create entitlements for SAP for detailed instructions.

   Note: On the Software Entitlement form, you must set the **Software model** field to the same software model that you created in step 1.

3. Create a client access record to specify the license usage of the SAP engine.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the page header of your ServiceNow instance, select **All**.

b. In the menu navigation filter, enter `samp_sw_client_access_list.do`.
The Client Access [samp_sw_client_access] table opens.

c. Select **New**.

d. In the **Name** field of the Client Access form, enter a name for the client access record.

e. Select the Lookup using list icon next in the **Software model** field to locate and select the software model for the SAP engine.

Note: Select the same software model that you created in step 1.

f. Enter an engine license usage value in the **Usage** field.

This license usage value is based on the license metric that is associated with the engine. For example, the license metric for the SAP E-Recruiting engine is **Employees**. If 200 employees are using an SAP E-Recruiting license, you must enter a license usage value of `200` in the **Usage** field.

Refer to Engine & Self-Declaration Product Measurement for more information on the license metrics that are associated with each SAP engine.

g. Select **Submit**.

Result
After you self-declare the license usage for the SAP engine, it is automatically included in the next SAP reconciliation that runs on your ServiceNow instance. Reconciliation runs weekly or on-demand.

Self-declare SAP engine license usage in the Software Asset Workspace

Use the Software Asset Workspace to self-declare the license usage for any SAP engines that cannot be measured by the automated SAP engine measurement process.

Before you begin
Role required: sam_user

About this task
To determine if you must self-declare the license usage for a given engine, see Engine & Self-Declaration Product Measurement in the SAP Support Portal. You must self-declare the license usage for any engine that is included in the list of Self-Declaration Products.

Important: You must have an SAP Support Portal account to access the SAP Support Portal.

Procedure
1. Create a software model for the SAP engine.
Refer to Create a software model in the Software Asset Workspace for detailed instructions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

On the Create New Software Model form, you must set the **Publisher** field to SAP. The form then reloads with only the software model fields that are applicable to SAP.

In addition, you must set the **Product** field to the SAP engine that you want to self-declare the license usage for.

2. Create entitlements for your software model.
You can create entitlements using either of the following options:

   - The **Create entitlement** button on the Software asset overview.

     Refer to Create entitlements in workspace for detailed instructions on how to create entitlements using this option.

     Note: On the Create New Software Entitlement form, you must set the **Software model** field to the same software model that you created in step 1.

   - The **Software Entitlements** tab on the software model record.

     To create entitlements using this option, open the record for the software model that you created in step 1. On the **Software Entitlements** tab of the software model record, select **New** and then fill in the fields on the corresponding Create New Software Entitlement form.

     Refer to Software entitlement fields for detailed descriptions of each field.

     Note: The **Software model** field populates automatically.

3. Specify the license usage of the SAP engine.

   a. Open the record for the software model that you created in step 1.

   b. On the **SAP Engine Usages** tab, select **New**.

   c. On the Create new SAP Engine Usage form, fill in the fields.

Create New SAP Engine Usage form

Field	Description
Name	Name that is used to identify and track your SAP engine license usage.
Software model	Software model that the SAP engine is associated with. This field populates automatically.
SAP client	SAP client that the SAP engine is installed or running on.
Usage	License usage of the SAP engine. This value is based on the license metric that is associated with the engine. For example, the license metric for the SAP E-Recruiting engine is **Employees**. If 200 employees are using an SAP E-Recruiting license, you must enter a license usage value of 200 in the **Usage** field. Refer to Engine & Self-Declaration

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Product Measurement for more information on the license metrics that are associated with each SAP engine.

d. Select **Save**.

Result

After you self-declare the license usage for the SAP engine, it is automatically included in the next SAP reconciliation that runs on your ServiceNow instance. Reconciliation runs weekly or on-demand.

Software Publisher Analytics dashboard for SAP in Software Asset Management classic

View your license compliance position for SAP on the Software Publisher Analytics dashboard in the Software Asset Management classic application.

Access the dashboard by navigating to **All** > **Software Asset** > **SAP Compliance and Optimization** > **Overview**.

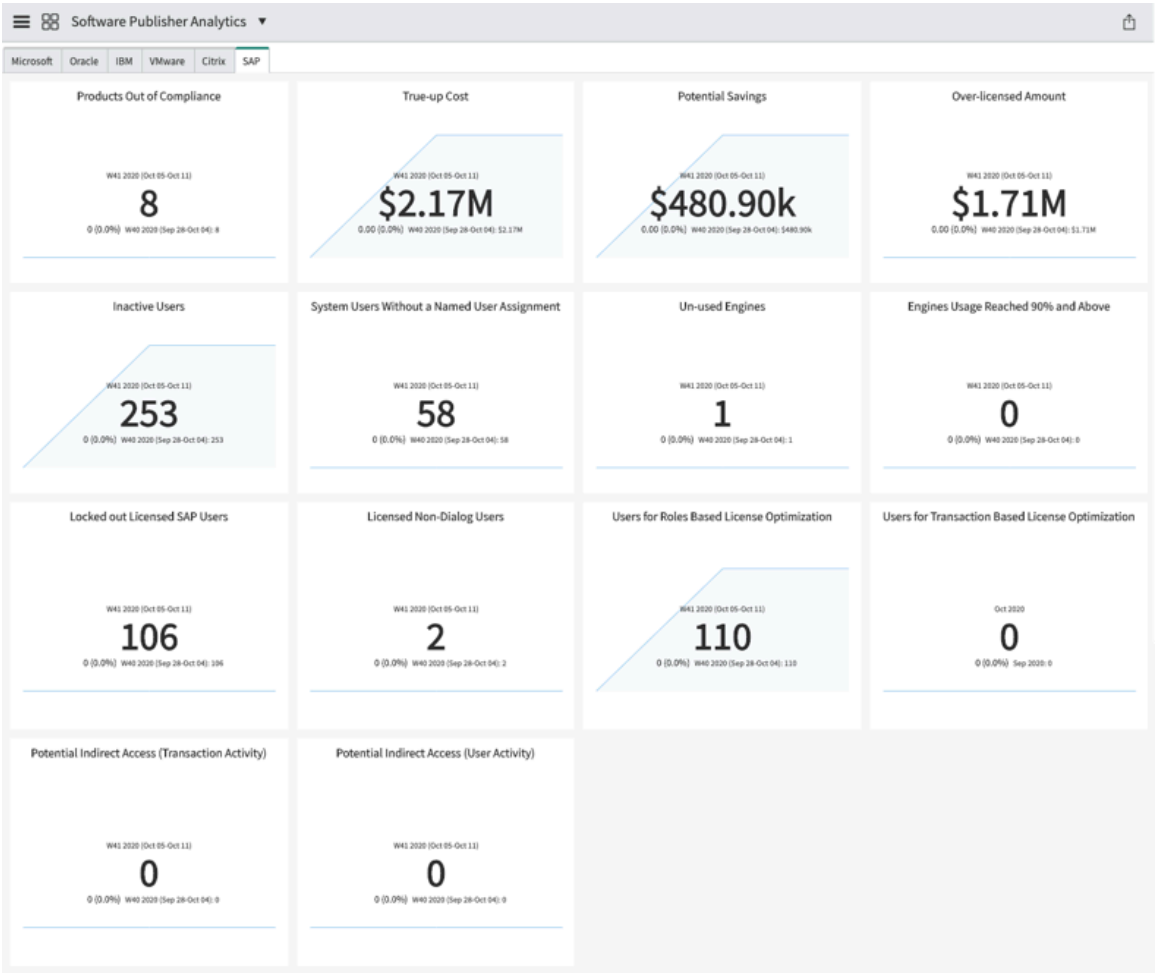
The dashboard is updated whenever a new reconciliation result is available.

End users and roles

End user and goal	Required role
SAM user: Can view the dashboard to track SAP license compliance and potential savings.	sam_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SAP dashboard



SAP tab

Report	Source list	Description
Products Out of Compliance	Software Model Result	Number of software models that are out of compliance.
True-up Cost	Software Model Result	Cost to be compliant based on the average prices for entitlements. The cost covers Named User Types and Engines.
Potential Savings	Software Model Result	Amount saved if removal candidates are reclaimed. The savings covers Named User Types and Engines.
Over-licensed Amount	Software Model Result	Cost of licenses that are owned but not used. The cost covers Named User Types and Engines.
Inactive Users	SAP System Users	SAP users who logged in over 90 days ago.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SAP tab (continued)

Report	Source list	Description
System Users Without a Named User Assignment	SAP System Users	SAP users who do not have a named user assignment.
Un-used Engines	License Metric Results	Number of SAP engines that have not been used but have active software entitlements.
Engines Usage Reached 90% and Above	License Metric Results	Number of SAP engines that reached 90% usage or higher.
Locked Out Licensed SAP Users	SAP System Users	Locked SAP users consuming a license.
Licensed Non-Dialog Users	SAP System Users	SAP non-dialog users that have a named user assignment.
Users For Roles Based License Optimization	SAP System Users	Number of SAP users that could have their role changed to optimize license consumption.
Users for Transaction Based License Optimization	SAP System Users	Number of SAP users for which Software Asset Management has detected user transaction-based license optimizations. Select the report to view the list of users that can be optimized.
Potential Indirect Access (Transaction Activity)	SAP System Users	Number of SAP users with indirect access to the SAP system based on user transaction activity. Users are given a score based on the amount of data received or sent by each connection.
Potential Indirect Access (User Activity)	SAP System Users	Number of SAP users that have indirect access to the SAP system. Users are given a score based on total CPU time, peak count, and steps.

Publisher overview for SAP in the Software Asset Workspace

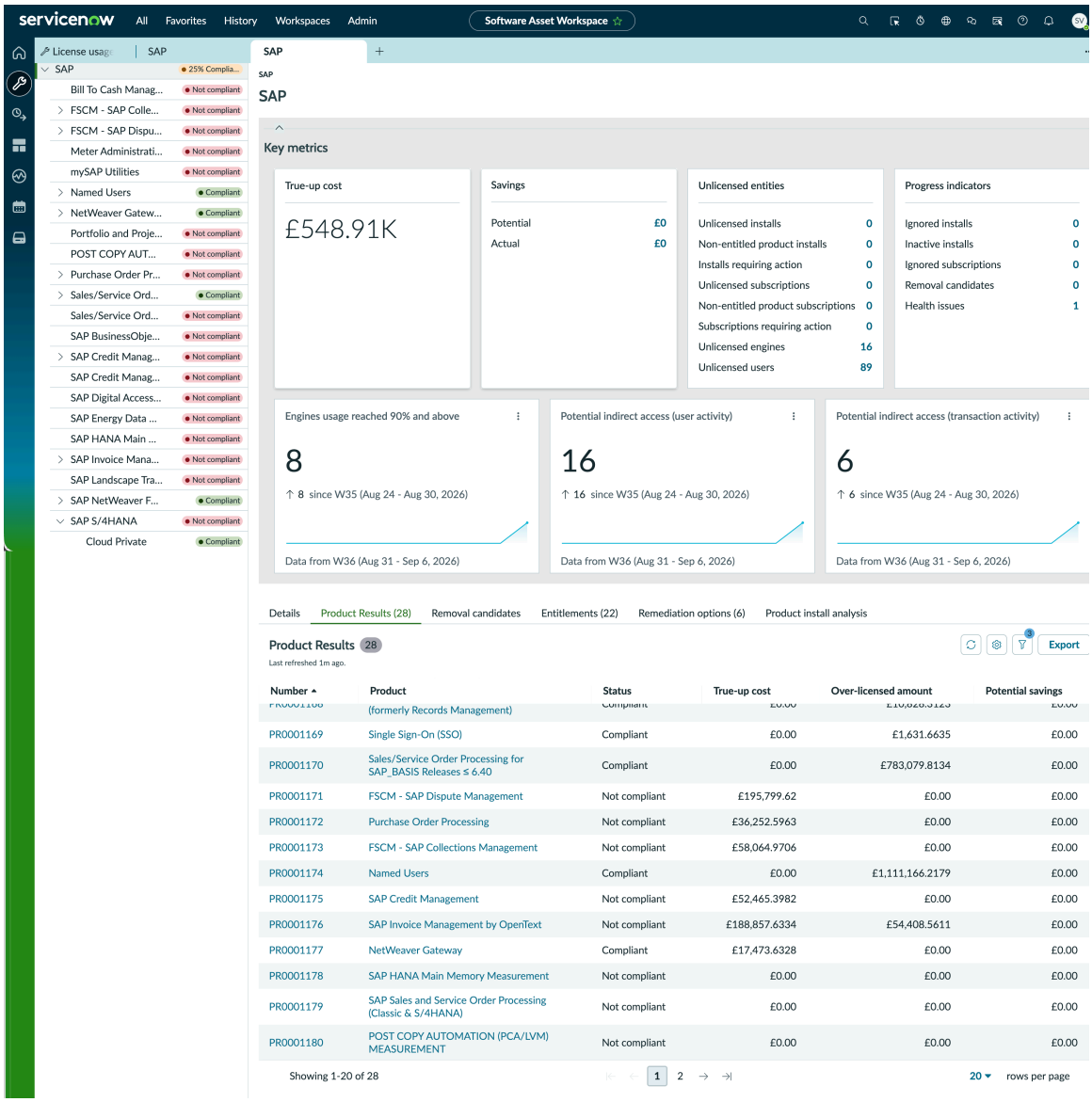
View license usage information related to SAP in the publisher overview for SAP in the Software Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

From the Software Asset Workspace, access the SAP publisher overview by navigating to **License usage** > **Publishers** and then selecting **SAP** from the list of available software publishers.

Results are updated whenever a new reconciliation result is available.

Note: Compliance results for SAP S/4HANA Cloud, Private Edition appear under the SAP S/4HANA product results. On-premises Named User compliance results appear under the Named User product results. If your organization has both on-premises and Private Cloud SAP systems, the results are shown separately for each deployment.



You can view a summary of your license usage information in the Summary section of the SAP publisher overview.

SAP Summary

Report	Description
True-up cost	Cost to be compliant based on the average price of rights in your SAP software entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SAP Summary (continued)

Report	Description
Potential savings	Potential cost savings for your SAP licenses.
Actual savings	Actual cost savings for your SAP licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information: • **Unlicensed client access**: Total number of unlicensed SAP client access records. Select the number to view the complete list of unlicensed SAP client access records. • **Unlicensed engines**: Total number of unlicensed SAP engines. Select the number to view the complete list of unlicensed SAP engines. • **Unlicensed users**: Total number of unlicensed SAP users. Select the number to view the complete list of unlicensed SAP users.
Progress indicators	Summary of your license compliance progress. This summary includes the **Removal candidates** indicator, which displays the total number of SAP removal candidates. Select the number to view the list of all software removal candidates.
Engines usage reached 90% and above	Total number of SAP engines that have reached 90% usage or higher.
Potential indirect access (user activity)	Total number of SAP users that have indirect access to the SAP system. Users are given a score based on total CPU time, peak count, and steps.
Potential indirect access (transaction activity)	Total number of SAP users with indirect access to the SAP system based on user transaction activity. Users are given a score based on the amount of data received or sent by each connection.

For more details on the license usage information that is provided in the publisher overview, see License usage publisher fields in workspace.

Software Asset Management publisher pack for VMware

Use the Software Asset Management publisher pack for VMware to track and optimize licensing for your VMware software products.

To use the VMware publisher pack, activate the Software Asset Management Professional for VMware (com.sn_samp_vmware) plugin.

VMware offers virtualization and cloud computing technologies that enable you to run software products and applications on virtual machines (VMs). The main component of VMware virtualization is the VMware hypervisor, which is a virtual machine monitor (VMM) that allows you to create and run VMs on your physical hosts. You can use either a Type 1 (bare metal) or Type 2 (hosted) hypervisor. A Type 1 hypervisor runs directly on the hardware of the underlying physical host, while a Type 2 hypervisor runs as a software layer on the operating system (OS) of the underlying physical host.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can collect and identify data for your VMware software installations by using a discovery tool, such as the ServiceNow® Discovery application. For more information on the discovery process, see Data collected by ITOM Visibility.

View your VMware license compliance position in the License usage view of the Software Asset Workspace. If any of your VMware software products are out of compliance, the License usage view provides corresponding remediation suggestions. For more information, see License usage view.

View compliance analysis results for VMware in either the Software Publisher Analytics dashboard for VMware (Software Asset Management classic application) or the publisher overview for VMware, Inc. (Software Asset Workspace). For more information on the Software Publisher Analytics dashboard for VMware, see Software Publisher Analytics dashboard for VMware in Software Asset Management classic. For more information on the publisher overview for VMware, Inc., see Publisher overview for VMware, Inc. in the Software Asset Workspace.

VMware licensing

The VMware publisher pack supports licensing for both subscription-based VMware vSphere software suites and individual perpetual-based VMware software products.

Licensing for VMware vSphere software suites

The VMware publisher pack supports licensing for both VMware vSphere Standard (VVS) and VMware vSphere Essentials Plus (VVEP), which are suite-based product offerings for VMware vSphere. VVS includes VMware vSphere Standard and VMware vCenter Standard. VVEP includes VMware vSphere Essentials Plus and VMware vCenter Essentials. Both software suites are available through the subscription licensing model.

You can calculate licensing requirements for VVS and VVEP by using the Per Core license metric. With this license metric, you must license the processor cores on the underlying physical hosts of the VMs that are running VMware vSphere Standard or VMware vSphere Essentials Plus. Each core requires one right, and you must license a minimum of 16 cores per processor. If you're using VVEP, each license can be used on a maximum of three physical hosts with up to two processors each, and each processor can have a maximum of 32 cores. Any additional cores remain unlicensed.

Note: vCenters are inferred as suite components of VVS and VVEP. They therefore don't require or consume any rights.

For example, you have purchased a subscription to VVS. You have deployed VMware vSphere Standard on ESXHost1, which has two processors with 20 cores each, and on ESXHost2, which has two processors with eight cores each. You can determine your licensing requirements based on the following calculations:

Host	Product	Number of processors	Number of cores per processor	Number of required rights
ESXHost1	VMware vSphere Standard	2	20	2 processors x 20 cores = 40 rights
ESXHost2	VMware vSphere Standard	2	8	2 processors x 16 cores (minimum) = 32 rights

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

In this example, you must have a total of 72 rights (40 rights for ESXHost1 + 32 rights for ESXHost2).

Licensing for individual VMware software products

The VMware publisher pack supports licensing for individual VMware software products. These products are available through the perpetual licensing model using license keys, which are the unique serial numbers that unlock and activate the features and capabilities of each product.

Important: As of December 11, 2023, VMware no longer offers new perpetual licenses for individual VMware software products. All VMware software products are now available through subscription-based software suites. If you still have any existing perpetual licenses, you can continue to manage them through the VMware publisher pack.

You can calculate licensing requirements for these software products by using the following license metrics:

- Per Application Instance: You must license the instances of an application. Each instance requires one right.
- Per Device: You must license the underlying physical hosts on which you access the software product. Each host requires one right.
- Per Named User: You must license the named users that access the software product. Each named user requires one right.
- Per OSI: You must license the underlying physical and virtual servers on which you access the software product. Each server requires one right.
- Per Processor: You must license the processors on the underlying physical hosts. Each processor requires one right for every 32 cores.

Software Publisher Analytics dashboard for VMware in Software Asset Management classic

View compliance analysis results related to VMware on the Software Publisher Analytics dashboard in the Software Asset Management classic application.

Access the Software Publisher Analytics dashboard by navigating to **All** > **Software Asset** > **Publisher Overview**.

Note: The add-on VMware publisher pack (com.sn_samp_vmware) plugin must be installed to view the VMware dashboard tab.

The dashboard is updated whenever a new reconciliation result is available. You can save charts in PNG or JPG format.

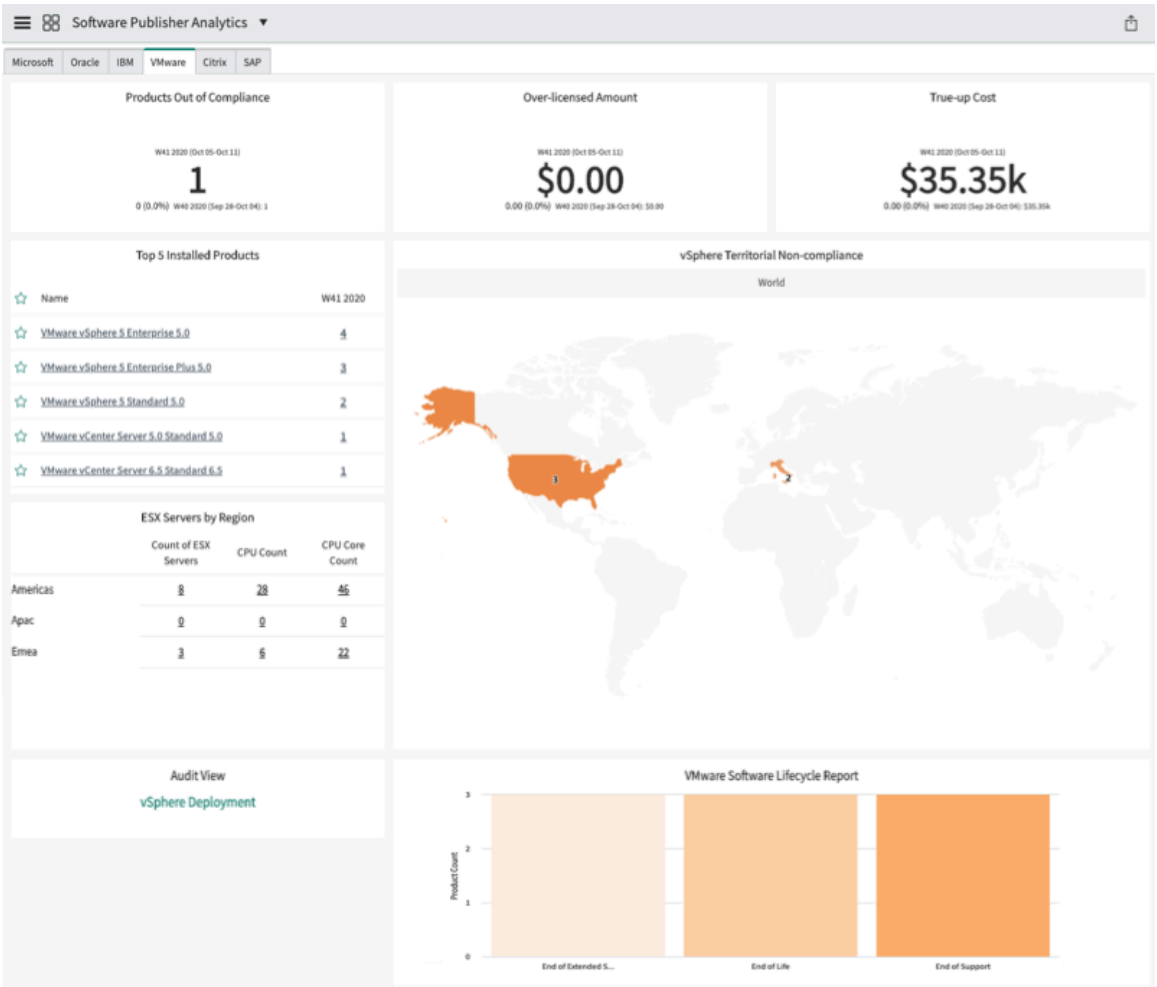
VMware dashboard

Information from VMware vCenter software is discovered and used for VMware reconciliation. Discovery uses these probes and populates these tables:

- vCenter probe ↗ VMware — vCenter ESX Hosts License
- VMware Discovered License Key [samp_vmware_license_key] and VMware Discovered License Key Consumption [samp_vmware_license_key_usage] tables

Note: The add-on VMware publisher pack (com.sn_samp_vmware) plugin must be installed to view the VMware dashboard tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



VMware tab

Report	Source list	Description
Products out of Compliance	Product Results	Number of products that have at least one software model out of compliance. Select the report to view the results in the Software license usage.
Over-licensed Amount	Product Results	Cost of licenses owned but not being used.
True-up Cost	Product Results	Cost to be compliant based on the average prices for entitlements for the rights.
Top 5 Installed Products	Software Installations	Count of top 5 VMware products installed.
vSphere Territorial Non-compliance	VMware Discovered License Key Consumptions	Compliance of VMware vCenter deployments. Drill down on the location to filter.
ESX Servers by Region	ESX Servers	Location, ESX count, CPU count, and cores count.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

VMware tab (continued)

Report	Source list	Description
Audit View	VMware Discovered License Key Consumptions	VMware vSphere deployments: Product, License Key, Used By, Assigned To, Location, CPU core count, CPU count, vCenter reference, evaluation expiration date, and software install.
VMware Software Lifecycle Report	Software Lifecycle Report	Number of products in each software lifecycle phase, including End of Extended Support, End of Life, and End of Support.

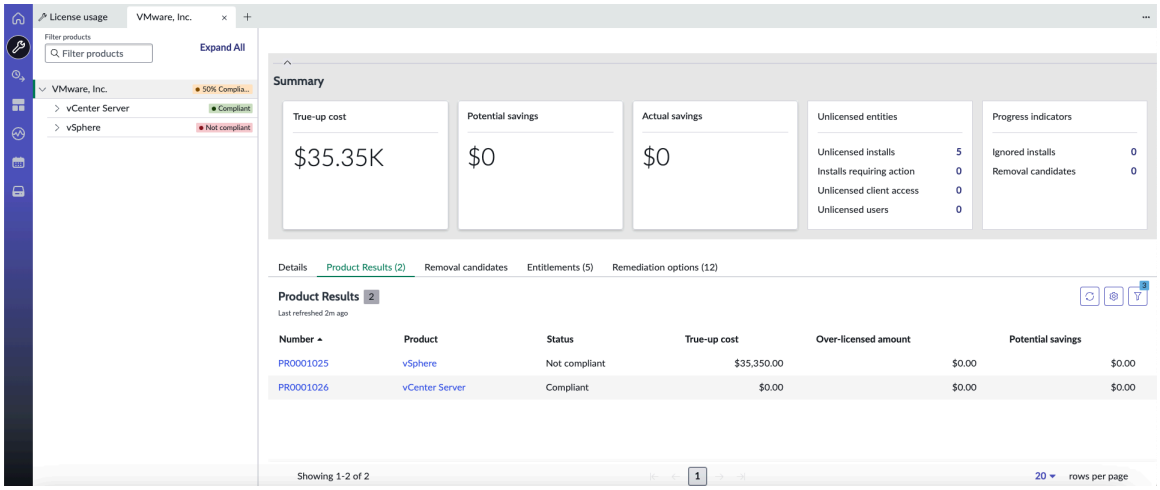
The **vSphere Deployment** related link shows the VMware Discovered License Key Consumptions list.

Publisher overview for VMware, Inc. in the Software Asset Workspace

View license usage information related to VMware in the publisher overview for VMware, Inc. in the Software Asset Workspace.

From the Software Asset Workspace, access the VMware, Inc. publisher overview by navigating to **License usage** > **Publishers** and then selecting **VMware, Inc.** from the list of available software publishers.

Results are updated whenever a new reconciliation result is available.



You can view a summary of your license usage information in the Summary section of the VMware, Inc. publisher overview.

VMware, Inc. Summary

Report	Description
True-up cost	Cost to be compliant based on the average price of rights in your VMware software entitlements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

VMware, Inc. Summary (continued)

Report	Description
Potential savings	Potential cost savings for your VMware licenses.
Actual savings	Actual cost savings for your VMware licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information: • **Unlicensed installs**: Total number of unlicensed VMware software installations. Select the number to view the complete list of unlicensed VMware software installations. • **Installs requiring action**: Total number of VMware software installations that you must take action on. Select the number to view the complete list of these VMware software installations. • **Unlicensed client access**: Total number of unlicensed VMware client access records. Select the number to view the complete list of unlicensed VMware client access records. • **Unlicensed users**: Total number of unlicensed VMware users. Select the number to view the complete list of unlicensed VMware users.
Progress indicators	Summary of your license compliance progress. This summary includes the following indicators: • **Ignored installs**: Total number of VMware software installations that were ignored during reclamation. Select the number to view the complete list of ignored VMware software installations. • **Removal candidates**: Total number of VMware removal candidates. Select the number to view the list of all software removal candidates.

For more details on the license usage information that is provided in the publisher overview, see License usage publisher fields in workspace.

Engineering license management

Monitor engineering licenses and usage through OpenLM and Open iT to eliminate audit risks, verify license optimization, reduce inaccurate forecasting, and prevent denials. These license management services support accurate forecasting for software in industries such as aerospace, oil and gas, and construction.

Watch this short video for an introduction to engineering license management.

https://player.vimeo.com/video/1011366881?badge=0&autopause=0&player_id=0&app_id=58479

Note: Request the Software Asset Management Professional for Engineering Applications store app (sn_samp_eng_app) to access the benefits of the Software Asset Management Professional for engineering applications. For more information, see Request Software Asset Management.

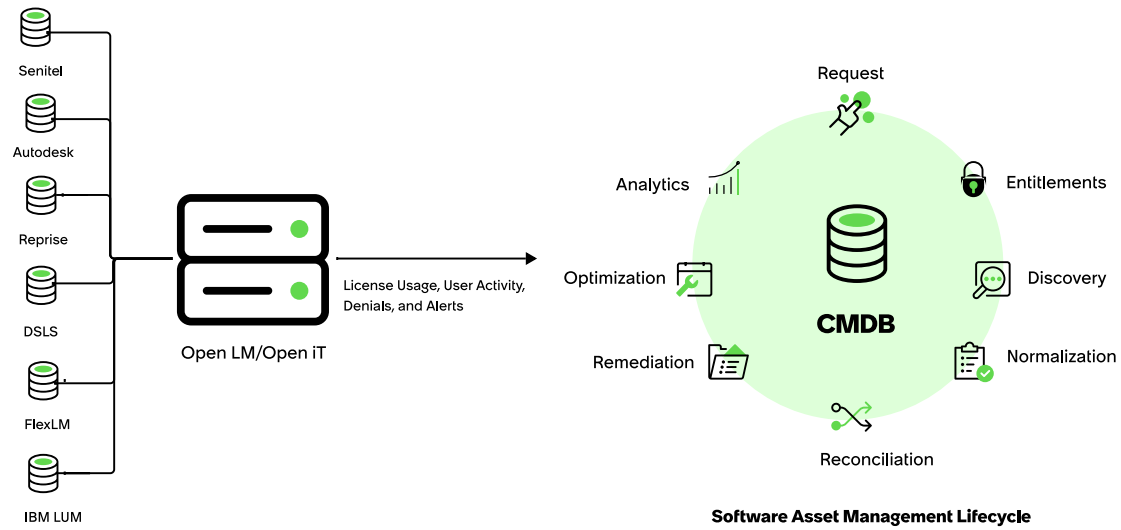
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Engineering license management overview

OpenLM and Open iT are software license monitoring and management tools that integrate with a wide variety of license management servers such as IBM License Use Management (LUM), Sentinel Technologies, Autodesk, Inc., and Bentley Systems, Inc. OpenLM and Open iT connect with each license management server, consolidate the data, and transfer the data to your ServiceNow instance via the ServiceNow Store application.

The OpenLM and Open iT integrations connect to license management servers to monitor thousands of engineering software licenses across publishers such as Sentinel, Reprise, FlexLM, Autodesk, DSLS, and IBM LUM. Both integrations are available in the ServiceNow Store.

The following graphic illustrates how OpenLM and Open iT work with the ServiceNow instance.



After you download the ServiceNow Store application and configure the application via Guided Setup, OpenLM and Open iT start data collection from all the license management servers that are connected to either of these. Data such as license usage, denials, user activity, and alerts are collected from the license management servers, and transferred to the ServiceNow instance. The data is normalized and reconciled to produce reports. You can see the total spend on engineering software, the most denied products, license usage over time, and other reports on the Engineering License overview dashboard in workspace. Additionally, you can view the lists of license management servers, discovered engineering licenses, daily peak concurrent usage, user denials, and other metrics on the License operations view.

Important: For more details on the OpenLM setup and configuration, see the Supporting Links and Docs section of the OpenLM Adapter Integration page in the ServiceNow Store.

For more details on the Open iT setup and configuration, refer to the Open iT LicenseAnalyzer page in the ServiceNow Store.

Analytics and reporting benefits

Data collected from OpenLM and Open iT integrations flows into the Software Asset Workspace. The Engineering License dashboard, available under the Software asset analytics view, helps you optimize software spend and support compliance activities. With this data, you can do the following:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Monitor concurrent license consumption to improve forecasting accuracy
- Track and reduce software spend by optimizing license usage
- Avoid productivity loss by monitoring license denials
- Support audits and contract renewals with consolidated usage data

Types of licenses supported for engineering applications

The Software Asset Management application supports various types of licenses for engineering applications.

Concurrent licenses

A concurrent license enables multiple users to share access to software applications from any computer on a network or from a virtual machine. License management servers that are installed on the network manage the distribution of a pool of shared licenses. The types of concurrent licenses include floating, network, and token licenses.

You can have multiple license management servers; one for each engineering application. The number of concurrent licenses in the shared pool determines the number of users who can use the software application at a given time. When you want to use an application, that application sends a request to the appropriate license management server to determine if a license is available. If a license is available, the application starts and the number of available licenses decreases by one. When the user exits the application, the license returns to the pool.

Subscription licenses

A subscription license enables users to access software applications for a specified period. Each license is assigned to an individual user. The Software Asset Management application supports subscription licenses, such as the Autodesk named user subscription license, to ensure accurate usage tracking of engineering applications. The Autodesk named user subscription license uses identity-based user profiles accessing cloud-based licenses.

Resource consumption

A resource consumption-based license metric supports client access license (CAL) reconciliation. This license metric represents a 1:1 ratio calculation between the Unit consumption column in the Resource Value [samp_sw_resource_value] table and the Licenses required column in the License Metric Results [samp_license_metric_result] table. The Software Asset Management application supports consumption-based licenses for license management servers such as Bentley Systems, Inc.

For more information on license metrics and metric groups, see Software license metrics.

Tables installed with engineering applications

Tables are installed with the Software Asset Management Professional for Engineering Applications store app (sn_samp_eng_app).

Tables

Tables installed for cloud concurrent usage

Table	Description
Engineering Application License Server	Registry of license servers for desktop engineering applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tables installed for cloud concurrent usage (continued)

Table	Description
[samp_eng_app_license_server]	
Engineering Application License Server Host [samp_eng_app_license_server_host]	Tracks host information for license servers.
Engineering Application License [samp_eng_app_license]	Stores desktop license definitions from engineering software sources.
Engineering Application Usage [samp_eng_app_usage]	Tracks desktop usage sessions with duration and session count metrics.
Engineering Application Concurrent Usage [samp_eng_app_concurrent_usage]	Tracks peak concurrent usage for desktop licenses by date.
Engineering Application Denial [samp_eng_app_denial]	Tracks desktop license denials with product normalization.
Engineering Application Workstation [samp_eng_app_workstation]	Registry of workstations discovered from engineering software sources.
Engineering Application User Group [samp_eng_app_user_group]	Stores user group definitions from engineering software sources.
Engineering Application User Group Mapping [samp_eng_app_user_m2m_group]	Defines many-to-many relationships linking users to groups.
Engineering Application Group Hierarchy [samp_eng_app_group_hierarchy]	Defines hierarchical relationships between user groups.
Engineering Application Project [samp_eng_app_project]	Tracks project information associated with engineering application usage.
Engineering Application Alert [samp_eng_app_alert]	Stores alert and notification records for engineering applications.
Engineering Application Last Activity [samp_eng_app_last_activity]	Tracks last activity timestamps for desktop engineering applications.
Engineering Application Cloud Concurrent Usage [samp_eng_app_cloud_conc_usage]	Tracks concurrent usage for cloud applications with peak usage metrics.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tables installed for cloud concurrent usage (continued)

Table	Description
Engineering Application Cloud Concurrent Usage Breakdown [samp_eng_app_cloud_conc_usage_breakdown]	Provides breakdown details for cloud concurrent usage linking to workstations and users.
Engineering Application Cloud Usage [samp_eng_app_cloud_usage]	Tracks cloud application usage sessions with duration metrics.
Engineering Application Cloud Denial [samp_eng_app_cloud_denial]	Tracks cloud application access denials with counts and timestamps.
Engineering Application Product Process [samp_eng_app_product_process]	Maps discovered file names to software products for content resolution.

Tables installed for subscription usage

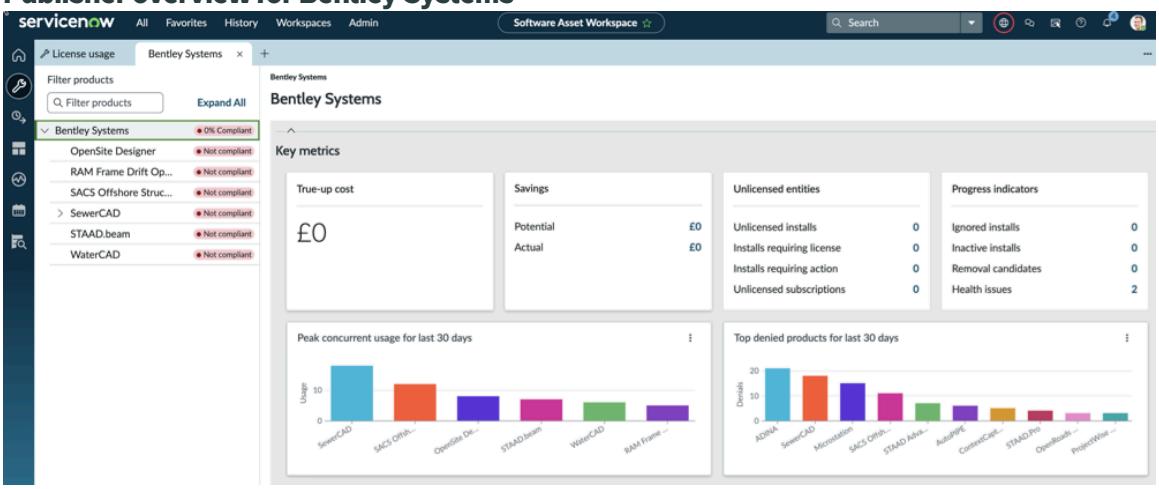
Table	Description
Engineering Application Named User [samp_eng_app_named_user]	Tracks named user license allocations for engineering applications.
Unrecognized Publisher Integration Map [samp_unrec_publisher_integration_map]	Maps unrecognized publishers to subscription integrations.

Publisher overview for Bentley Systems in the Software Asset Workspace

View license usage information for Bentley Systems and its software models in the publisher overview in the Software Asset Workspace.

From the Software Asset Workspace, access the publisher overview by navigating to **License usage** > **Publishers** and then selecting Bentley Systems from the list of publishers.

Publisher overview for Bentley Systems



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Bentley Systems Key metrics

Report	Description
True-up cost	Cost to be compliant with based on the average price of rights in your software entitlements.
Potential savings	Potential cost savings for your engineering licenses.
Actual savings	Actual cost savings for your Bentley Systems licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information: • Unlicensed installs: Total number of unlicensed Bentley Systems software installations. Select the number to view the complete list of unlicensed software installations. • Installs requiring license: Total number of Bentley Systems software installations that require licenses. Select the number to view the complete list of these software installations. • Installs requiring action: Total number of Bentley Systems software installations that you must take action on. Select the number to view the complete list of these software installations. • Unlicensed subscriptions: Total number of unlicensed Bentley Systems subscriptions. Select the number to view the complete list of unlicensed subscriptions.
Progress indicators	Summary of your license compliance progress. This summary includes the following information: • Ignored installs: Total number of software installations that were ignored during reclamation. Select the number to view the complete list of ignored software installations. • Inactive installs: Total number of software installations that are inactive. Select the number to view the list of inactive software installations. • Removal candidates: Total number of removal candidates. Select the number

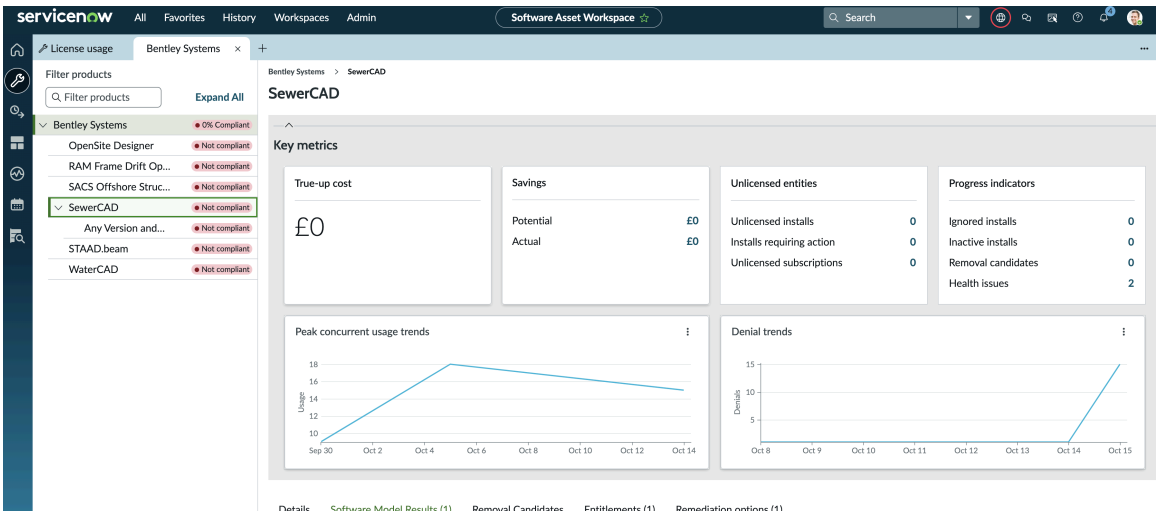
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Bentley Systems Key metrics (continued)

Report	Description
	to view the list of all software removal candidates. • Health issues: Total number of health issues based on the health scan. Select the number to view the list of all health issues.
Peak concurrent usage for last 30 days	Peak concurrent usage for Bentley Systems products for the last 30 days. Select a bar to view the complete list of users that have access to the specified software product.
Top denied products for last 30 days	Top denied products for Bentley Systems for the last 30 days. Select a bar to view the complete list of users that have been denied the specified software product.

You can view the key metrics on license usage information for a Bentley Systems software product by selecting the product on the list.

Publisher overview for SewerCAD



SewerCAD Key metrics

Report	Description
True-up cost	Cost to be compliant with based on the average price of rights in your software entitlements.
Potential savings	Potential cost savings for your SewerCAD licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SewerCAD Key metrics (continued)

Report	Description
Actual savings	Actual cost savings for your SewerCAD licenses.
Unlicensed entities	Summary of your unlicensed entities. This summary includes the following information: • Unlicensed installs: Total number of unlicensed SewerCAD installations. Select the number to view the complete list of unlicensed software installations. • Installs requiring license: Total number of SewerCAD installations that require licenses. Select the number to view the complete list of these software installations. • Installs requiring action: Total number of SewerCAD installations that you must take action on. Select the number to view the complete list of these software installations. • Unlicensed subscriptions: Total number of unlicensed SewerCAD subscriptions. Select the number to view the complete list of unlicensed subscriptions.
Progress indicators	Summary of your license compliance progress. This summary includes the following information: • Ignored installs: Total number of software installations that were ignored during reclamation. Select the number to view the complete list of ignored software installations. • Inactive installs: Total number of software installations that are inactive. Select the number to view the list of inactive software installations. • Removal candidates: Total number of removal candidates. Select the number to view the list of all software removal candidates. • Health issues: Total number of health issues based on the health scan. Select the number to view the list of all health issues.
Peak concurrent usage trends	Peak concurrent usage trends for SewerCAD for the last 30 days.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SewerCAD Key metrics (continued)

Report	Description
	Select a bar to view the complete list of users that have access to the specified software product.
Denial trends	Denial trends for SewerCAD for the last 30 days. Select a bar to view the complete list of users that have been denied the specified software product.

SaaS License Management

SaaS License Management tracks and controls cloud-based application subscriptions within Software Asset Management (SAM). This capability helps organizations manage subscriptions, monitor usage, and control costs across hybrid and direct SaaS models.

SaaS subscription models

SaaS applications and services are typically subscribed to on a per-user basis. They generally fall into two categories:

- **Hybrid SaaS**

  Hybrid SaaS combines on-premise installations with cloud-based subscriptions. It's commonly used by organizations that require offline access to certain applications while also using cloud features for collaboration. This model is also suitable for businesses with compliance requirements that mandate local installations. For example, a Microsoft 365 subscription enables you to access cloud services and install applications like Microsoft Excel on their devices. SAM supports the following Hybrid SaaS integrations:

  - Adobe Cloud integration
  - Microsoft 365 integration

- **Direct SaaS**

  Direct SaaS refers to applications where all data and functionality are hosted in the cloud and accessed through the internet. You typically log in via a web browser or a dedicated app without installing software locally. For example, a Miro subscriber accesses the application entirely online. This model is common for organizations that prioritize ease of deployment and minimal maintenance, and for teams that work remotely or across multiple locations.

> **Important:** This topic focuses on the Direct SaaS category. It explains how to get started, identifies areas where Direct SaaS can be applied, and outlines ways to use available solutions and workflows effectively.

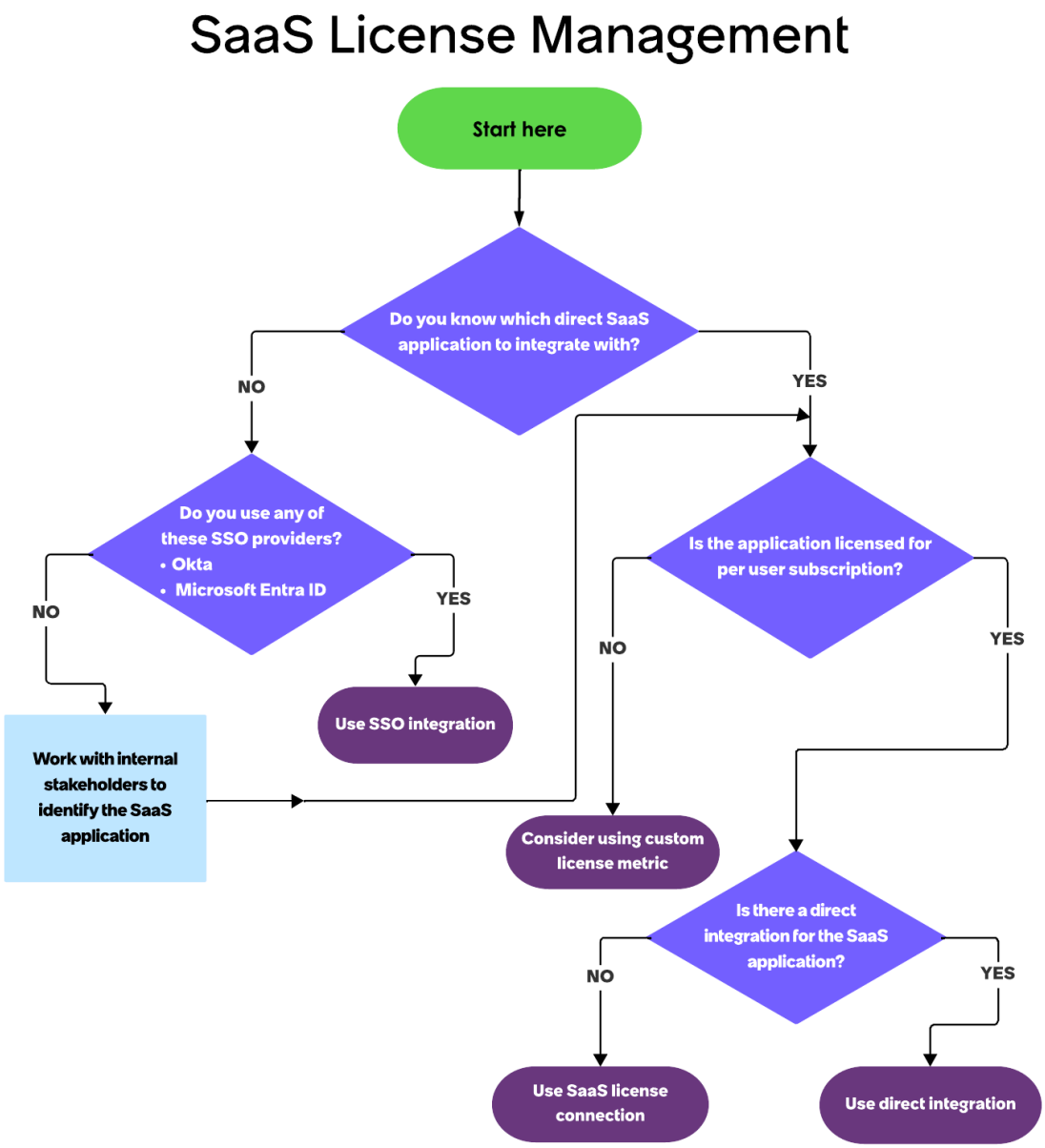
Managing Direct SaaS with the SaaS License Management application

Managing Direct SaaS applications can vary based on organizational needs. The best approach depends on factors such as the level of integration required, available APIs, and whether SSO (Single Sign-On) is in place.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Use Direct Integration when you need deep usage insights and automated license management for supported vendors.
- Use SaaS License Connections when you want flexibility to connect any SaaS app with a public API and prefer a low-code setup.
- Use SSO Integration when you need visibility into apps connected through an SSO provider and want to address SaaS sprawl.

For more information about installing SaaS License Management, see Request SaaS License Management.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Approaches for managing SaaS applications

Option	Key features	Benefits	Reclamation support
Direct Integration	• Base system or default direct integrations • Full visibility into individual user-to-application assignments • Identifies inactive or unused subscriptions based on usage and last activity signals • Orchestrates the reclamation workflow end to end	• Provides detailed usage insights • Automates license management • Reduces manual effort	• When the underlying application or publisher API supports write-back (programmatic removal or de-provisioning of users). • When an integration provides usage visibility but does not offer a reclamation or write-back API, SAM identifies reclamation candidates. You must remove users manually or through a custom workflow.
SaaS License Connections	• Connect to any SaaS application with a public API • Low-code framework using ServiceNow® via Integration Hub and Workflow Studio	• Flexible for any SaaS application • Customizable workflows	Depends on the public API and custom workflow configuration. Build removal logic through Workflow Studio for supported applications.
SSO Integration	• Connect via SSO providers such as Okta and Microsoft Entra ID. • Analyzes user login activity • Generates reclamation candidates for stale or inactive users • Download the list of applications or users	• Helps tackle SaaS sprawl • Improves cost control • Simplifies user access management	• For users who are directly assigned to applications (supported for both Azure and Okta). • For users accessing applications through Okta or Microsoft Entra ID groups. Group-based removal is not automated. A single group can grant access to multiple applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Approaches for managing SaaS applications (continued)

Option	Key features	Benefits	Reclamation support
	• Identify overlapping software and rationalize applications		Removing a user from a group could have unintended downstream effects across other apps.

Request SaaS License Management

Request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) so that you can create and manage integrations with your SaaS and Single Sign-on (SSO) applications. You can use these integrations to track license usage and to reclaim unused licenses.

Before you begin

Activate the ServiceNow Software Asset Management Professional plugin (com.snc.samp) on your ServiceNow instance. For more information on how to request and activate the Software Asset Management Professional plugin (com.snc.samp), see Request Software Asset Management.

Role required: admin

About this task

To use the SaaS License Management application, you must request the Software Asset Management — SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

Note: When upgrading to the Software Asset Management – SaaS License Management plugin (sn_sam_saas_int) version 16.0.6 or later in the Zurich release, verify that the Software Asset Workspace store app (sn_sam_workspace) is updated to version 9.0.4.

Procedure

1. From a web browser, go to the ServiceNow Store.
2. Log in using your HI credentials.
3. In the search bar, enter `Software Asset Management - SaaS License Management` and then select **Search**.
4. Select the result called Software Asset Management - SaaS License Management.
5. On the Software Asset Management - SaaS License Management page, select **Request Install**.
6. In the ServiceNow Request for App Installation - Software Asset Management - SaaS License Management dialog box, fill in the fields.

ServiceNow Request for App Installation - Software Asset Management - SaaS License Management dialog box

Field	Description
Instance Name	Name of the instance on which you want to install the plugin. After you enter the instance name, select **Validate Instance** to verify that the instance exists.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Reason for request	Reason for requesting the plugin.

7. Select **Request**.
8. Select **Close**.

Result
If your request is approved, you receive an email with detailed instructions on how to install the plugin.

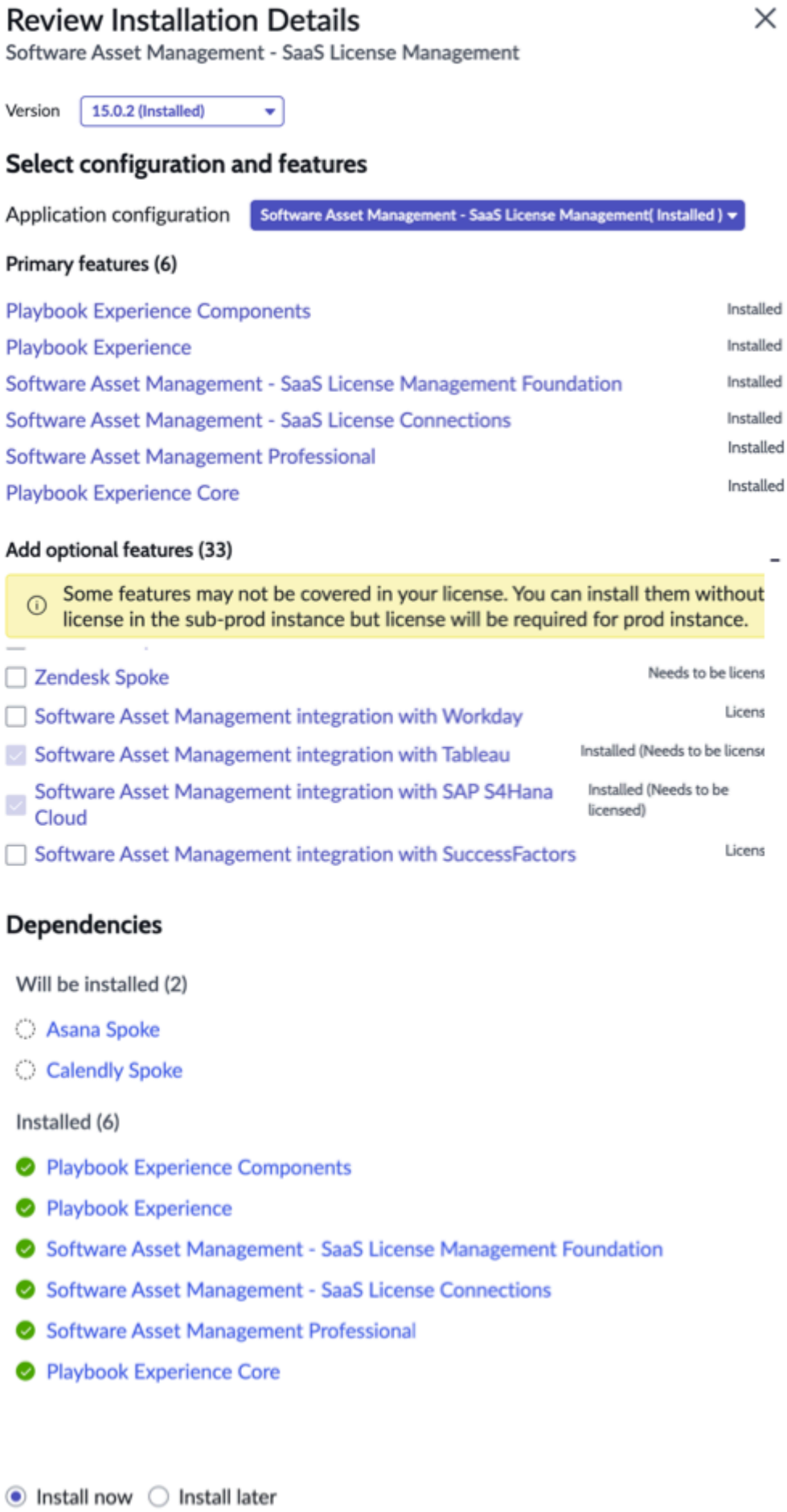
What to do next
Install the plugin according to the instructions from the email.

Navigate to **All** > **Admin Center** > **Application Manager**. On the Application Manager page, search for and select **Software Asset Management - SaaS License Management**.

After the application is installed and ready for use, you can choose the required SaaS applications that you need by selecting **Install optional features** on the Application Manager page.

You can see the primary features and the list of optional features that you can select in the Review Installation Details dialog box. If you haven't selected any optional features, you would get the base system features of this application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After you select the optional features, select **Install**. You can initiate or schedule the installation process by selecting **Install now** or **Install later**. View the installation progress and you'll get a success message after the installation is complete.

Installed with SaaS License Management

User roles and tables are installed with SaaS License Management. Demo data is available for the Software Asset Management - SaaS License Management (sn_sam_saas_int) plugin.

User roles

Role	Description
sam_integrator	Inherits the sam_user role and can also create and manage SaaS integration profiles.

Tables

Table	Description
Custom Subscription Product Definitions [samp_sw_custom_subscription_product_definition]	Enables you to create and update customized software models for SaaS and SSO applications.
Custom Subscription Integration [samp_sw_custom_subscription_integration]	List of SaaS and SSO providers for your custom integration profiles.
Product profile types [samp_sw_product_profile_type]	Provides a mapping between integration profile types and products in the Software Product [samp_sw_product] table.
SAM Subscription Script Routes [sam_saas_script_route]	Stores which script includes and scopes implement a given integration type to register available integrations from separate scoped apps.
SSO Application [samp_sso_application]	List of all SSO applications for all SSO integrations.
SSO Application Groups [m2m_sso_group_application]	Provides a mapping between connected SSO applications and the directory groups that have access to them.
SSO Application Role [samp_sso_application_role]	List of SSO users and groups for all connected SSO applications.
SSO Application Users [m2m_sso_user_application]	Provides a mapping between connected SSO applications and the directory users that have access to them.
SSO Integration Profile [samp_sso_integration_profile]	List of all SSO integration profiles.
SSO Subscription [samp_sso_subscription]	List of SSO subscriptions for all connected SSO applications.
Subscription Consumption Summaries [sam_saas_consumption_summary]	Consumption summary information including units consumed, monthly consumption, and contract dates.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Subscription Integration [samp_sw_subscription_integration]	List of SaaS and SSO providers that is mapped to subscription products in the Subscription Product Definition [samp_sw_subscription_product_definition] table.
Subscription Product Definitions [samp_sw_subscription_product_definition]	SaaS License Management uses this table to automatically create software models for SaaS and SSO applications. Software models are automatically created for applications with an **External Catalog ID** that matches an **Identifier** in this table.
Subscription Usage Summary [samp_subscription_usage_summary]	Software usage summary information including rights owned, rights assigned, stale rights, available rights, and cost.
Unrecognized Subscription Identifiers [samp_sw_unrecognized_subscription_identifier]	List of subscription identifiers that are not associated with a software model.

SaaS License Management setup for large companies

Set up SaaS License Management for large companies to confirm that you can view all SaaS usage data in your ServiceNow instance.

Some large companies must update the *com.snc.pa.dc.max_row_count_indicator_source* system property before creating integration profiles. If either of the following conditions is true for your company, an admin must update this property.

- If there are more than 50,000 user subscriptions for the SaaS applications, excluding the subscriptions for Adobe Cloud and Microsoft 365.
- If there are more than 50,000 user subscriptions for Adobe Cloud and Microsoft 365 combined.

Update the *com.snc.pa.dc.max_row_count_indicator_source* system property to be the greater value between your subscriptions for the two groups. For example, if you have 60,000 user subscriptions for SaaS applications combined and 25,000 user subscriptions for Adobe Cloud and Microsoft 365 combined, update the property to be `60,000`.

Note: For more information about how to use the *com.snc.pa.dc.max_row_count_indicator_source* property, see Data collector properties.

SaaS Overview dashboard

Optimize how much your organization spends on SaaS and SSO licensing by analyzing the subscription usage, cost, and compliance of your SaaS applications and SSO providers using the SaaS Overview dashboard.

Important: The SaaS Overview dashboard is available in both the Software Asset Management classic application and the Software Asset Workspace. This topic provides information on the SaaS Overview dashboard in the Software Asset Management classic application. For information on the SaaS Overview dashboard in the Software Asset Workspace, see SaaS overview dashboard in workspace.

The Engineering License Overview dashboard is no longer available for new Brazil users who have activated the Software Asset Management Professional (com.snc.samp) plugin or upgraded

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

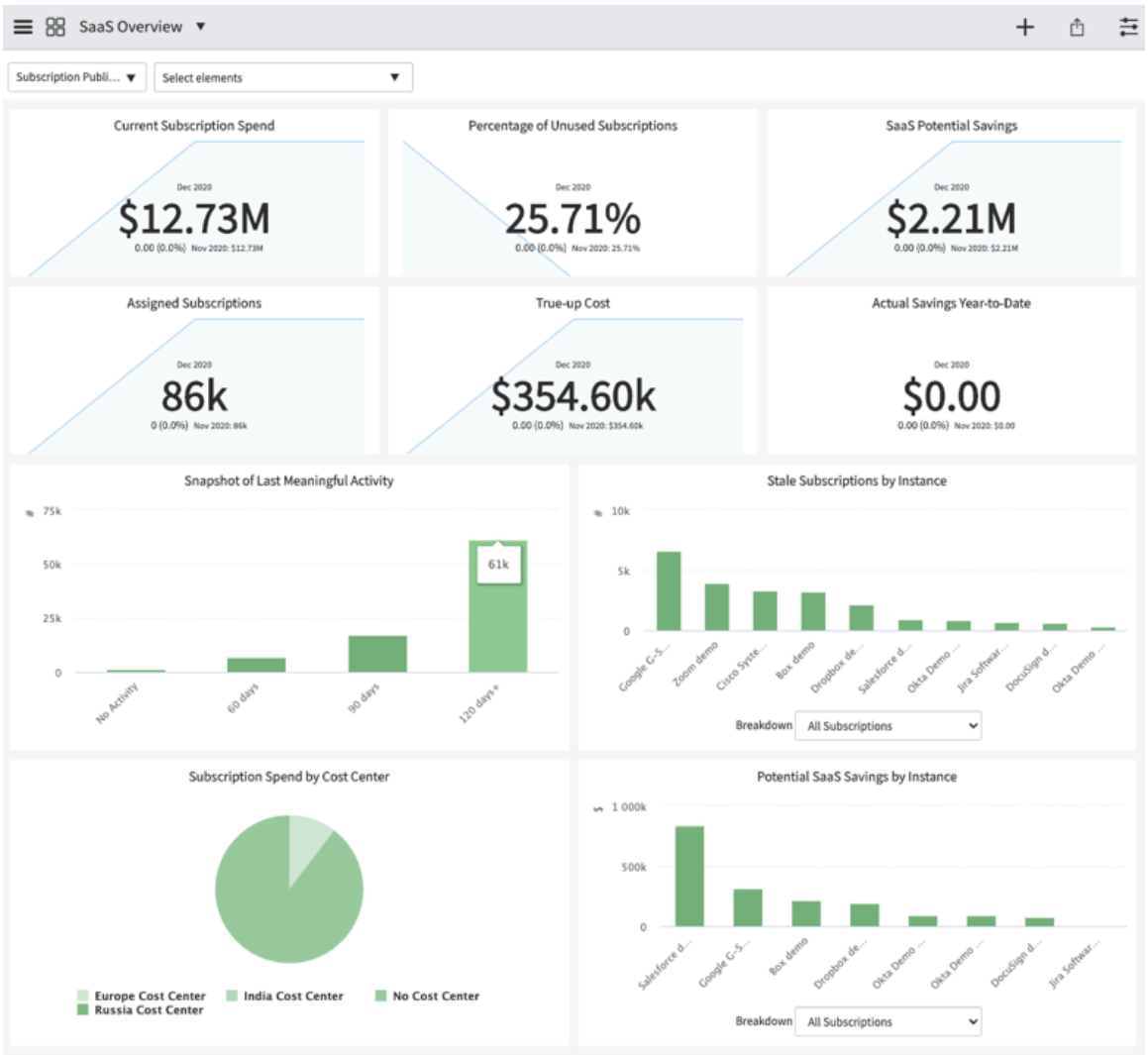
to Brazil without activating the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil.

- If you activated the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil but didn't activate the Workspace plugin (com.sn_sam_workspace), you have access to this dashboard.
- If you activated the Software Asset Workspace (sn_sam_workspace) store application after upgrading to Zurich, you won't be able to access this dashboard from the **Software Asset** navigation menu in your instance. You can however access this dashboard from the **Dashboards** navigation menu.

The SaaS Overview dashboard displays information about the usage, costs, and potential savings that are associated with your SaaS and SSO applications. Access this dashboard by navigating to **SaaS License** > **Overview**. You can filter the dashboard by software model or publisher. Click any report to see more information.

Note: To view your organization's software usage and compliance for Microsoft Office 365 and Adobe Cloud, navigate to **SaaS License** > **Office 365 & Adobe Cloud**.

SaaS Overview dashboard



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SaaS Overview reports

Report	Description
Current Subscription Spend	Total cost of all active subscription software entitlements.
Percentage of Unused Subscriptions	Percentage of subscriptions that don't meet the usage requirements that are defined by reclamation rules. This percentage is calculated as the number of stale rights (subscriptions that have limited to no activity within the activity threshold that is defined in the reclamation rule) divided by the total number of assigned rights.
SaaS Potential Savings	Potential cost saved if you reclaim unused subscriptions.
Assigned Subscriptions	Total number of assigned subscriptions.
True-up Cost	Cost to have the number of rights you own match the number of rights you've assigned to users. This metric helps to verify that your organization is paying for all the rights that your organization is using.
Actual Savings Year-to-Date	Total yearly savings for all subscription software. This value is calculated as the total savings from closed complete reclamation candidates.
Snapshot of Last Meaningful Activity	Distribution of users based on their subscription software usage behavior. Use this data to identify the users with the highest software usage and determine the most appropriate threshold for your software reclamation rules. This report displays the data for the last 30 days, 30–60 days, 60–90 days, and 90–120 days.
Stale Subscriptions by Instance	Total number of stale subscriptions for each subscription profile. If you have multiple profiles for the same subscription software, this report displays each profile separately. You can filter the data that is displayed on this report by selecting an option from the Breakdown list. To view the stale subscriptions for both SaaS and SSO subscription profiles, select **All Subscriptions**. To view the stale subscriptions for only SaaS subscription profiles, select **Subscriptions Excluding SSO**.
Subscription Spend by Cost Center	Total cost of all active subscription software entitlements by cost center.
Potential SaaS Savings by Instance	Potential cost saved for each subscription profile if you reclaim unused subscriptions. You can filter the data that is displayed on this report by selecting an option from the Breakdown list. To view the potential savings for both SaaS and SSO subscription profiles, select **All Subscriptions**. To view the potential savings for only SaaS subscription profiles, select **Subscriptions Excluding SSO**.

Integrate with SaaS applications

Create an integration profile to view software usage information and optimize stale licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

A SaaS integration profile pulls your company's software usage information from the software vendor. This information includes a list of all users and identifies which users haven't recently used the software.

You can create an integration profile for the following SaaS applications:

- Adobe Cloud
- Adobe Workfront
- Aha!
- Asana
- Box
- Calendly
- Cisco Webex
- Confluence Cloud
- CrowdStrike
- Docusign
- Dropbox
- Google Workspace
- GitHub
- GoTo
- Jira Software
- Looker
- Microsoft 365
- Microsoft Dynamics 365 and Power Apps
- Miro
- monday.com
- PagerDuty
- Rally
- Roadmunk
- Salesforce CRM
- Salesforce Marketing Cloud
- SAP Ariba
- SAP S/4HANA Public Cloud
- Slack
- SmartRecruiters
- Smartsheet
- SAP SuccessFactors
- SurveyMonkey
- Tableau Cloud
- Trello
- Workday

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Workplace from Facebook
- Zendesk
- Zoom

You can also create integrations for Adobe Cloud and Microsoft Office 365. For more information, see Microsoft 365 integration and Software Asset Management publisher pack for Adobe.

If you want to integrate with a SaaS application that is not on this list, you can create a custom integration profile. For more information, see Create a custom integration profile.

You can also integrate with SaaS applications using the Configuration Console for Software Asset Management. For more details about the Configuration Console, see Configuration Console for Software Asset Management.

Note:

The SaaS integration automatically creates a software model and a reclamation rule for the software. Always review the reclamation rule to make sure that reclamation candidates are identified using the criteria you want.

After reviewing the reclamation rule, create a software entitlement to track purchased licenses and cost.

Integrating with SaaS applications

After following this process, you're ready to start reclaiming unused licenses to reduce software costs for your company.

Related topics

Configuration Console for Software Asset Management

Configuration Console overview

Configure Software Asset Management using the Configuration Console

Integrating with Adobe Workfront

Integrating your Software Asset Management application with the Adobe Workfront application enables you to track your software subscriptions and to reclaim unused licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Adobe Workfront application	Authentication scopes
Download subscriptions	administrator	None
Pull user activity	administrator	None
Reclaim subscription	administrator	None

Generate a Workfront API key

Generate an API key for authenticating Workfront API requests.

Before you begin

Workfront Role required: administrator

Procedure

1. From a web browser, open Adobe Workfront.
2. Log in using your admin credentials.
   Your Adobe Workfront instance opens.
3. On the page header of your Adobe Workfront instance, select the Main Menu icon and then select **Setup**.
4. From the left navigation menu of the Setup page, navigate to **System** > **Customer Info**.
   The Customer Info page opens.
5. In the API Key Settings section, select **Generate API Key**.
   Adobe Workfront automatically generates your API key and displays it under Your User's API Key.
6. Copy your API key and save it in a secure location for later use.
7. In the same section, select the time period after which you want the API key to expire from the **After creation, API keys expire** list.
   The default time period is one month.

Note: You can change this time period at any time. Whenever you change the time period, the newly selected time period begins from the moment that you make the change.

Create a Workfront integration profile

Create a Workfront integration profile to track software subscriptions and optimize licensing for your Workfront applications.

Before you begin

To create a Workfront integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Workfront Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

If you're using Software Asset Workspace, the option to create the Workfront integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Workfront Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Workfront** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `Workfront Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **Workfront Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Workfront Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Workfront Update User Activity**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Workfront Reclaim Subscription**.

Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_workfront_spoke.Workfront**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection dialog box

Field	Description
Connection Information	
Connection Name	Name of the Workfront connection. This field populates automatically.
Connection URL	URL for the connection. Enter `https://<domain-name>.my.workfront.com`, where <*domain-name*> is your company subdomain.
Credential Information	
API Key	API key for your Workfront applications. Enter the same API key that you generated in Generate a Workfront API key.

8. Select **Create**.
9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

10. After the connection is verified, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

12. **Optional:** To optimize memory and avoid performance issues in your Workfront flow, you can turn off the flow engine reporting level.
    a. Navigate to **System Properties** > **All Properties**.
    b. Select the *com.snc.process_flow.reporting.level* system property.
    c. On the System Property page, set the **Value** to OFF.
    d. Select **Update**.
13. **Optional:** Reduce the number of items in the execution details.
    a. Navigate to **System Properties** > **All Properties**.
    b. Select the *com.snc.process_flow.reporting.datastream.item.lastn* system property.
    c. On the System Property page, set the **Value** to 10.
    d. Select **Update**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Aha!

Integrating your Software Asset Management application with the Aha! service enables you to track your software subscriptions and to reclaim unused licenses.

For more information about the Aha! service, see Aha! Product management guide.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Aha! application	Authentication scopes
Download subscriptions	admin	None
Pull user activity	admin	None
Reclaim subscription	admin	None

Create an Aha! OAuth2 application

Create an Aha! OAuth2 application to get access to the Aha! API.

Before you begin

Aha! Role required: admin

Procedure

1. Go to OAuth2 Authentication.
2. Log in to the Aha! site using your admin credentials.
3. On the Personal settings page, select **Developer**.
4. Select the **OAuth applications** tab.
5. Select **Register OAuth application**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. On the Register new OAuth application form, enter `https://instance/oauth_redirect.do` as the Redirect URI, where *instance* is the name of your ServiceNow instance.
7. Select **Create**.
   The **OAuth applications** tab shows Client ID and Client Secret keys.
8. Note down the values in the Client ID and Client Secret fields.

Create an Aha! integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Aha! service.

Before you begin

To create an Aha! integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Aha! Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Aha! integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Aha Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Aha!** from the drop-down list. **d.** Select **Continue**.

2. In the **Display name** field, enter a display name of your choice.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `Aha Integration`.
Status	Status of the integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **Aha! Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Aha! Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Aha! Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_aha_spoke.Aha_**.

5. Open the connection & credential aliases record by selecting the preview icon ⓘ next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Fields	Descriptions
Connection Name	Name of the integration profile.
Connection URL	Connection URL for Aha!.
OAuth Client ID	OAuth2 key that you received while creating an OAuth2 authentication from the Aha! site.
OAuth Client Secret	OAuth Client Secret key that you received while creating an OAuth2 authentication from the Aha! site.
OAuth Redirect URL	ServiceNow redirect URL.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. Select **Create and Get OAuth Token** and then select **Authorize**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.

10. After the connection is verified, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Asana

Integrating your Software Asset Management application with the Asana application enables you to track your software subscriptions and to reclaim unused licenses.

Note: This integration supports all plans of Asana at organization level only.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Asana application	Authentication scopes
Download subscriptions	admin	default
Pull user activity	admin	default
Reclaim subscription	admin	default

Register an Asana OAuth 2.0 application

Register an Asana OAuth application to access the Asana API 1.0 and to receive a Client ID and Client secret.

Before you begin

Asana Role required: admin

Procedure

1. Log in to your Asana account.
2. Select the user's profile icon.
3. Select **Settings**.
4. Select the **Apps** tab.
5. Navigate to the developer console window by selecting the **View developer console** link.
6. Select **+ Create new app**.
7. On the **Create new app** page, provide a name for your application and then select the **Integrate Asana and another tool** check box.
8. Select the **I agree to the Asana API Terms** check box and then select **Create app**.
9. **Optional:** Provide basic information about your application.
10. Select **OAuth**.
11. Copy the Client ID and Client secret for later use.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

12. In the **Redirect URLs** field, select **+ Add redirect URL**.
13. Enter `https://<instance>.service-now.com/oauth_redirect.do` where <instance> is the name of your ServiceNow instance.

Create an Asana integration profile

Create an Asana integration profile to track software subscriptions and optimize licensing for your Asana solutions.

Before you begin

The Software Asset Management - SaaS License Management Integrations plugin (sn_sam_saas_int) must be installed from the ServiceNow Store.

Role required: sam_integrator

Important: You must select the **Asana Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Asana Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Asana** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration profile form

Field	Value
Display name	Name of the integration profile. For example, Asana integration.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to #**Draft**. ○ If you have already published the integration profile, this field is automatically set to#**Published**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Profile type	Type of integration profile. This field is automatically set to Asana Subscription.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Asana Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Asana Update User Activity**.

      Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

      In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

      Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

      You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

   c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Asana Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   A draft integration profile is created.

   The **Connection & Credential** field appears and is automatically set to **sn_asana_spoke.Asana**.

5. Open the connection & credential aliases record by selecting the preview icon beside the **Connection & Credential** field.
6. Select **Open Record** in the record preview.
7. Select the **Create New Connection & Credential** related link.
8. In the Create Connection and Credential dialog box, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create Connection and Credential dialog box

Field	Value
Connection Name	Name of the Asana connection. This field populates automatically.
Connection URL	URL for the connection. This field is automatically set to `https://app.asana.com`.
Client ID	Client ID that you created while registering Asana OAuth application.
Client Secret	Client secret that you created while registering Asana OAuth application.
OAuth Redirect URL	This field is automatically populated to `https://<instance name>.service-now.com/oauth_redirect.do`, where instance name is the name of your ServiceNow instance.

9. Select **Create and Get OAuth Token**.
10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.
11. After the connection is verified, select **Publish**.
12. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Box

Integrating your Software Asset Management application with the Box service enables you to track your software subscriptions and to reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Box application	Authentication scopes
Download subscriptions	Co-Admin with **Manage users** permission	Manage users
Pull user activity	Co-Admin with Run new reports and access existing reports permission	Manage enterprise properties
Reclaim subscription	• Co-Admin with **Manage users** permission • Co-Admin with **View users' content** permission	• Manage users • Read all files and folders stored in Box • Write all files and folders stored in Box

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For additional information on the Box service, see the Box Community.

Create a Box application

Create an application on the Box Platform.

Before you begin

Box Role required: Refer to the Minimal user permissions table.

Procedure

1. Navigate to the Box Developer Console and sign in to your account.
2. On the My Platform Apps page, select **New App**.
3. On the form, fill in the fields.

Create a new app form

Field	Description
App Name	Name of your application.
App Type	The application type. Select **OAuth 2.0**.

4. Select **Create App**.
5. On the Configuration page, obtain the Client ID and Client Secret.

   You'll need to copy and paste these values into your ServiceNow instance in the following steps.

   Note: Your Client ID and Client secret are sensitive. Don't share them.

6. Enter `https://instance.service-now.com/oauth_redirect.do` as the Redirect URI, where *instance* is the name of your ServiceNow instance.
7. Under Content Actions, select the following application scope check boxes:
   - Read all files and folders stored in Box
   - Write all files and folders stored in Box
8. Under Administrative Actions, select the following application scope check boxes:
   - Manage users
   - Manage enterprise properties

   These scopes enable the integration to get a list of users, get user activity, and reclaim unused subscriptions.
9. Select **Save**.

Create a Box integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Box service.

Before you begin

To create a Box integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

If you're using Software Asset Workspace, the option to create the Box integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Box Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Box** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Value
Display name	Name of the integration profile. For example, `Box Integration`
Client Id	Client ID for the OAuth application created in the SaaS admin account.
Redirect url	URL of the OAuth provider that you're redirected to after authentication. This value is automatically populated.
Client secret	Password associated with the client ID.
Profile type	Type of integration profile. This value is automatically set to *`Box Subscription`*.
Analyze user activity from	You can choose to start analyzing data from the current date or from up to 60 days in the past. Choosing a date in the past enables you to detect stale subscriptions without waiting in real time because you can see subscriptions that haven't been used recently. Because choosing a date in the past increases the amount of data that is analyzed, it could take several hours for you to be able to view the results.

3. In the Process configuration section, review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information about the required roles and scopes, see Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The **Download subscriptions** check box is selected by default and you can't clear it.

- The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Events* isn't created.

  In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

  Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

  You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

- The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Submit**.
   Your ServiceNow instance creates a draft integration profile.
5. On the integration profile, select **Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

6. In the pop-up window, select your Box admin account and select **Allow**.

   Note: When user subscriptions are reclaimed, files from the reclaimed accounts are transferred to the admin account selected in this step. This account can be a different admin account than the one used to set up the integration. If you transfer files to a new admin, you can select the **Get OAuth Token** related link again at any time to select a different admin account. After selecting a new admin, you can reclaim the old admin account to transfer all of their files to the new admin, including all previously reclaimed user files.

7. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

8. After the connection is validated, select **Publish**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is validated and scheduled jobs are created, you must revalidate the connections because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Events* job gets deleted.

Result

You can view events performed by individual users up to one year prior to the current date. For more information, see Review a software reclamation rule. Software Asset Management pulls the events from the time that you start downloading user subscriptions irrespective of the profile creation date.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Calendly

Integrating your Software Asset Management application with the Calendly service enables you to track your software subscriptions and to reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Calendly application	Authentication scopes
Download subscriptions	admin	• users:read • organizations:read
Pull user activity	admin	• users:read • scheduled_events:read
Reclaim subscription	admin	organizations:write

Create a Calendly OAuth application

Register a public application with the Calendly service so that you can access the Calendly API using OAuth 2.0.

Before you begin

You must have a Google or GitHub account to sign up for a Calendly developer account.

Calendly Role required: admin

Procedure

1. Navigate to Calendly developer portal.
   - If you already have a Calendly developer account, sign in with your credentials and go to step 3.
   - If you don't have a Calendly developer account, complete step 2.
2. **Optional:** Sign up for a Calendly developer account through your GitHub or Google account by selecting **Sign Up** on the Calendly Developer Site page.
   This account isn't associated with your Calendly Google user account.
3. Navigate to **Account** > **My Apps** to create an OAuth application.
4. Select **Create a new app**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. On the form, fill in the fields.

Create Oauth app form

Field	Description
Name of app	Name of your application.
Kind of app	Application type such as Web or Native.
Environment type	Environment type that you want to associate your application to, such as Sandbox or Production.
Redirect URI	ServiceNow redirect URL. For example, `https://app.example.com/auth`.

6. Select **Next**.
7. In the **Scopes** tab, add the following scopes as needed.
   - users:read
   - organizations:read
   - scheduled_events:read
   - organizations:write
8. Select **Create**.

What to do next
Copy your Client ID and Client Secret.

Warning: You must copy these values as you can't access the Client Secret again.

Create a Calendly integration profile

Create an integration profile to track software subscriptions and optimize stale licenses for the Calendly service.

Before you begin
To create a Calendly integration profile, request the Software Asset Management - SaaS License Management (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Calendly Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task
If you're using Software Asset Workspace, the option to create the Calendly integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Calendly Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Calendly** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `Calendly Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **Calendly Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

> **Note:** For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Calendly Download Subscriptions**.

> **Note:** The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Calendly Update User Activity**.

> **Note:** The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Calendly Reclaim Subscription**.

Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
Your ServiceNow instance creates a draft integration profile.

The **Connection & Credential** field appears and is automatically set to **sn_calendly_spoke.Calendly**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Name	Name of the connection.
Connection URL	Base URL for the Calendly API. This field is automatically set to `https://api.calendly.com`.
OAuth Client ID	Client ID that is assigned to the public application that you registered with the Calendly service.
OAuth Client Secret	Client secret that is assigned to the public application that you registered with the Calendly service.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This field populates automatically based on your instance name.

8. Select **Create and Get OAuth Token**.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. In the Authorize App dialog box, log in to your Calendly account.
   The dialog box closes and then you automatically return to the integration profile form.
10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.
11. After the connection is verified, select **Publish**.
12. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Cisco Webex

Integrating your Software Asset Management application with Cisco Webex applications enable you to track your software subscriptions and reclaim unused licenses.

The supported Cisco Webex applications are:

- Webex Meetings
- Webex Teams
- Webex Training
- Webex Events
- Webex Support Session

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Cisco Webex application	Authentication scopes
Download subscriptions	Read-only admin	• spark-admin:licenses_read • spark-admin:people_read
Pull user activity	• Compliance Officer • Full admin	• spark-compliance:events_read • meeting:admin_schedule_read
Reclaim subscription	Full admin	• spark-admin:people_read • spark-admin:people_write

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a Webex Meetings OAuth application

Create an OAuth integration application in Cisco Webex for Developers.

Before you begin

Webex Role required: Refer to the Minimal user permissions table.

Procedure

1. Login to Webex developer portal by using your Webex credentials.
2. Select your profile icon and then select **My Webex Apps**.
3. Navigate to **Create a New App** > **Select Integration** > **Create an Integration**.
4. On the form, fill in the fields:

New Integration form

Field	Value
Will This Integration Use A Mobile SDK?	No
Integration Name	Name of your integration as it appears in Webex. For example, ServiceNow integration.
Contact Email	Email address of the administrator.
Icon	Icon to appear on the My Apps page. Either upload your own application icon or select one from the list of default icons.
Description	Description of your integration. For example, functionality of the integration and its benefits.
Redirect URI	The URI that will be redirected to when completing an OAuth grant flow.`https://<instance>.service-now.com/oauth_redirect.do`, where *`instance`* is the name of your ServiceNow instance.
Scopes	To access the integration APIs, you must select the **meeting:admin_schedule_read** scope.

5. Select **Add Integration**.
6. Copy and save the **OAuth Client ID** and **OAuth Client Secret** that appear for later use.

Create a Webex Teams OAuth application

Create an OAuth integration application in Cisco Webex for Developers.

Before you begin

Webex Role required: Refer to the Minimal user permissions table.

Procedure

1. Navigate and log in to Cisco Webex for Developers.
2. Under the profile icon, select **My Webex Apps**.
3. Navigate to **Create a New App** > **Select Integration** > **Create an Integration**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. On the form, fill in the fields:

New Integration form

Field	Value
Will This Integration Use A Mobile SDK?	No
Integration Name	Name of your integration as it appears in Webex. For example, ServiceNow integration.
Contact Email	Email address of the administrator.
Icon	Icon to appear on the My Apps page. Either upload your own application icon or select one from the list of default icons.
Description	Description of your integration. For example, functionality of the integration and its benefits.
Redirect URI	The URI that will be redirected to when completing an OAuth grant flow.`https://<instance>.service-now.com/oauth_redirect.do`, where *`instance`* is the name of your ServiceNow instance.
Scopes	To access the integration APIs, you must select these scopes: ○ spark-admin:licenses_read ○ spark-admin:organizations_read ○ spark-admin:people_read ○ spark-admin:people_write ○ spark-admin:roles_read ○ spark-compliance:events_read ○ meeting:admin_schedule_read

5. Select **Add Integration**.
6. Copy and save the **OAuth Client ID** and **OAuth Client Secret** that appear for later use.

Create a Webex integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Cisco Webex applications.

Before you begin

To create a Webex integration profile, request the Cisco Webex Meetings and Webex Teams spoke apps from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select **Cisco Webex Teams Spoke** and **Cisco Webex Meetings Spoke** check boxes for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

If you're using Software Asset Workspace, the option to create the Webex integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Webex Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Webex** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration profile form

Field	Description
Display name	Name of the profile. For example, Webex integration.
Status	Status of the integration profile. ○ If you haven't published the integration profile, this field is automatically set to #**Draft**. ○ If you have already published the integration profile, this field is automatically set to#**Published**.
Profile type	Type of integration profile. This field is automatically set to Webex Subscription.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Cisco Webex Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Cisco Webex Update User Activity**.

> **Note:** The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

> **Note:** Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Cisco Webex Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
A draft integration profile is created.

In the **Download Subscription Subflow** tab, the **Connection & Credential** field appears and is automatically set to **sn_cisco_teams_spk.CiscoWebexTeams**. In the **Calculate Activity Subflow** tab, the **Connection & Credential** field appears and is automatically set to **sn_webex_mtg_spoke.Webex**.

> **Note:** The automatically populated value in the **Connection & credential** field changes based on the selection in the **Download activity** and **Reclaim subscriptions** check boxes.

Automatically populated Connection & credential values based on the selection

Selection	Connection & credential value
Both **Download activity** and **Reclaim subscriptions** are selected.	sn_cisco_teams_spk.webex_subscription_activity_reclaim
Only **Download activity** is selected.	sn_cisco_teams_spk.webex_subscription_activity
Only **Reclaim subscriptions** is selected.	sn_cisco_teams_spk.webex_subscription_reclaim
Both **Download activity** and **Reclaim subscriptions** aren't selected.	sn_cisco_teams_spk.webex_subscription

5. In the **Download Subscription Subflow** tab, select the preview icon ⓘ next to the **Connection & Credential** field and then select **Open Record** in the record preview.

6. Select the **Create New Connection & Credential** related link.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. On the form, fill in the **OAuth Client ID** and **OAuth Client Secret** that you had saved while creating the Webex Teams OAuth application.
   Leave all other fields as is.
8. Select **Create and Get OAuth Token**.

   Note: Make sure you're logged in to your ServiceNow instance using your local admin credentials. Logging in with SSO user credentials might cause the tokens to be generated automatically.

   For the role required to perform this step, refer to the Minimal user permissions table.

9. When prompted, log in using your Webex Email address and Password.
10. After the connection is successfully created, navigate to the Webex integration profile.
11. In the **Calculate Activity Subflow** tab, select the preview icon (ⓘ) next to the **Connection & Credential** field and then select **Open Record** in the record preview.
12. Select the **Create New Connection & Credential** related link.
13. On the form, fill in the fields.

Create Connection and Credential form

Connection URL	Replace <subdomain> with the Webex Meeting site domain configured for the organization. Log in to the Webex admin portal and navigate to **SERVICES** > **Meeting** > **Sites**. In the Site name column, <subdomain> is the part of `<subdomain>.webex.com` in the site name.
Webex Admin User Name	User name or email address to log in to Webex.

14. Fill in the **OAuth Client ID** and **OAuth Client Secret** values that you saved while creating the Webex Meetings OAuth application.
15. Select **Create and Get OAuth Token** and follow the steps to get an OAuth token.

    Note: For the role required to perform this step, refer to the Minimal user permissions table.

16. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

17. After the connection is verified, select **Publish**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

18. In the Publish Confirmation dialog box, select **OK**.

> **Note:** If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:
>
> - The **Status** field on the integration profile form changes to **Draft**.
> - The **Validate connection** button shows up on the form.
> - The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple Cisco Webex integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Confluence Cloud

Integrating your Software Asset Management application with the Confluence Cloud application enables you to track your software subscriptions and to reclaim unused licenses.

Currently this integration supports only one site integration per profile.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Confluence Cloud application	Authentication scopes
Download subscriptions	User role for confluence product	• Read user groups (read:confluence-groups) • Read user (read:confluence-user)
Pull user activity	User role for confluence product	Search Confluence content and space summaries (search:confluence)
Reclaim subscription	site admin	• Read user groups (read:confluence-groups) • Create, remove, and update user groups (write:confluence-groups)

Create a Confluence Cloud OAuth 2.0 (3LO) application

Create a Confluence Cloud OAuth 2.0 (3LO) application to enable access to the Confluence Cloud API.

Before you begin

Atlassian Role required: Refer to the Minimal user permissions table.

Procedure

1. From a web browser, open the Atlassian Developer portal.
2. Log in to your site admin account.
3. On the page header of the portal, select your profile icon and then select **Developer console**.
   The My apps page of the Atlassian Developer Console opens.
4. Select the **Create app** menu and then select **OAuth 2.0 (3LO) integration**.
   The Create a new OAuth 2.0 (3LO) integration page opens.
5. Enter a name for the OAuth 2.0 (3LO) application in the **Name** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select the **I agree to be bound by Atlassian's developer terms** check box and then select **Create**.
7. Configure the authorization settings for your application.
   a. From the left navigation pane, select **Authorization**.
   b. Select **Configure** for the OAuth 2.0 (3LO) authorization type.
   The OAuth 2.0 authorization code grants (3LO) for apps page opens.
   c. In the **Callback URL** field, enter the URL of the OAuth provider that users are redirected to after authentication.
   Enter `https://instance.service-now.com/oauth_redirect.do`, where <*instance*> is the name of your ServiceNow instance.
   d. Select **Save changes**.
8. Configure API scopes for your application.
   API scopes specify the level of access that the application has to the Atlassian APIs.
   a. From the left navigation pane, select **Permissions**.
   b. From the list of available APIs, locate the Confluence API and then select **Add**.
   The **Add** action button automatically changes to the **Configure** action button.
   c. Select **Configure**.
   The Confluence API page opens.
   d. Add the following scopes for the Confluence API:
      - Search Confluence content and space summaries
      - Read user groups
      - Create, remove, and update user groups
      - Read user
9. Retrieve the client ID and client secret that are assigned to your application.
   a. From the left navigation pane, select **Settings**.
   b. In the Authentication details section, copy the values in the **Client ID** and **Secret** fields.
   Save them in a secure location for later use.

Obtain the Cloud ID value of Confluence Cloud instance

Obtain the value of the Cloud ID of the Confluence Cloud cloud instance. This value is required during the configuration of the connection record in your ServiceNow instance.

Before you begin
Confluence Cloud Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Log in to Atlassian Administration.
2. Select the **Select** button against the required organization.
3. Select the **Products** tab.
4. On the Products page, select **Manage product** on the Confluence product row.

   The URL is in the following format in a new window: `https://admin.atlassian.com/o/<orgID>/products/conf/<Cloud-Id>`.

5. Copy the value of the Cloud ID for later use.

Create a Confluence Cloud integration profile

Create a Confluence Cloud integration profile to track software subscriptions and optimize licensing for your Confluence Cloud applications.

Before you begin

To create a Confluence Cloud integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

Atlassian Role required: site admin

ServiceNow Role required: sam_integrator, sn_confluence_spoke.confluence_cloud_admin

Important: You must select the **Confluence Cloud Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Confluence Cloud integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Confluence Cloud Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Confluence Cloud** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration Profile form

Field	Value
Display Name	Name of the integration profile. For example, `Confluence Cloud Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **Confluence Cloud Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Confluence Cloud Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Confluence Cloud Update User Activity**.

      Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *`SAM - Refresh <displayname> Activity`* isn't created.

      In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

      Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

      You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

   c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Confluence Cloud Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

A draft integration profile is created.

The **Connection & Credential** field appears and is automatically set to **sn_confluence_spoke.confluence_subscription_activity_reclaim** when all the processes are selected.

Note: The automatically populated value in the **Connection & credential** field changes based on the selection in the **Download activity** and **Reclaim subscriptions** check boxes.

Automatically populated Connection & credential values based on the selection

Selection	Connection & credential value
Both **Download activity** and **Reclaim subscriptions** are selected.	sn_confluence_spoke.confluence_subscription_activity_reclai
Only **Download activity** is selected.	sn_confluence_spoke.confluence_subscription_activity
Only **Reclaim subscriptions** is selected.	sn_confluence_spoke.confluence_subscription_reclaim
Both **Download activity** and **Reclaim subscriptions** aren't selected.	sn_confluence_spoke.confluence_subscription

5. Open the connection & credential aliases record by selecting the preview icon ⓘ next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Name	Name of the connection.
Connection URL	Provide the URL of your Confluence Cloud instance in the `https://api.atlassian.com/ex/confluence/<Cloud-ID` format. For more information about getting the value of Cloud ID, see Obtain the Cloud ID value of Confluence Cloud instance.
OAuth Client ID	Client ID that is assigned to your Confluence Cloud OAuth 2.0 (3LO) application.
OAuth Client Secret	Client secret that is assigned to your Confluence Cloud OAuth 2.0 (3LO) application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This field populates automatically based on the callback URL that you specified in Create a Confluence Cloud OAuth 2.0 (3LO) application.

8. Select **Create and Get OAuth Token**.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. When the dialog box appears, grant permission to the Confluence Cloud application.
   The dialog box closes and you automatically return to the Connection & Credential Aliases form.
10. Specify the groups that have access to Confluence products.
    By specifying these groups on your ServiceNow instance, you can retrieve data and manage licenses for only the users within these groups.

    a. In a new tab, open the Atlassian Administration portal.

    b. Log in to the admin account with a site_admin role.

    c. Select the **Select** button against the required organization.

    d. Select the **Products** tab.

    e. On the Products page, select **Manage product** on the Confluence product row.

    f. View the list of groups that have access to Confluence products.
    Take note of this information for later use.

    g. Return to your ServiceNow instance and navigate to **Confluence Cloud** > **Confluence Groups**.

    h. On the Confluence Groups form, select the **Add Groups** related link.
    The Add Confluence Groups dialog box opens.

    i. Select the Connection & Credential that was set on the integration profile.

    j. In the Available list, select the groups that have access to Confluence products.

    Tip: The Available list includes all groups that are associated with your Atlassian account. Select only the groups that have access to Confluence products.

    k. Select the right arrow button to move the groups from the Available list to the Selected list.

    l. Select **OK**.

11. Return to your integration profile and then select the integration profile.
12. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

13. After the connection is verified, select **Publish**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

14. In the Publish Confirmation dialog box, select **OK**.

> **Note:** If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:
>
> - The **Status** field on the integration profile form changes to **Draft**.
> - The **Validate connection** button shows up on the form.
> - The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple Confluence Cloud integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with CrowdStrike

Integrating your Software Asset Management application with the CrowdStrike enables you to view CrowdStrike active host sensors information and check license compliance.

Note: CrowdStrike currently doesn't support the APIs for integration in regulated environments, including US-GOV-1 (GovCloud) or US-GOV-2 CrowdStrike clouds.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the CrowdStrike application	Authentication scopes
Download consumption	Falcon administrator	Sensor usage scope with read permissions

This process is applicable for Zurich Patch 7, Software Asset Management - SaaS License Management (sn_sam_saas_int) 17.0.5, and Software Asset Management (sn_itam_samp) 4.1.0 version onwards.

Register a CrowdStrike OAuth application

Register the CrowdStrike OAuth application to access the CrowdStrike API and to receive a Client ID and Client secret.

Before you begin

The CrowdStrike Integration Hub spoke must be active. For more information, see CrowdStrike spoke.

CrowdStrike Role required: Falcon administrator

Important:

- To use the Sensor Usage APIs, your API client must be assigned the Sensor usage scope with Read permissions.
- Contact your account team to enable the following feature flags:
  - Hourly usage data feature flag: This flag must be enabled for your Customer Identification (CID) to view hourly usage data.
  - Aggregated usage data feature flag: This flag must be enabled to get aggregated usage data in multi-CID (non-Flight Control) accounts.

Procedure

1. Log in to Falcon using your admin credentials.
2. Navigate to **Support and resources** > **API Clients and Keys**.
3. Select **Create API Client**.
4. Provide the client name and description.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select the **Read** check box for the **Sensor usage** scope.
6. Select **Create**.
   The API client created screen is displayed.
7. Copy the Client ID and Secret for later use.
8. Select **Done**.

Create a CrowdStrike integration profile

Create a CrowdStrike integration profile to track software subscriptions and optimize licensing for your CrowdStrike applications.

Before you begin

The Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) must be installed from the ServiceNow Store.

ServiceNow Role required: sam_admin or sam_integrator

Important: You must select the **CrowdStrike Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the CrowdStrike integration profile in Core UI is inactive.

Note: When upgrading to Yokohama patch 1 with Software Asset Management - SaaS License Management (sn_sam_saas_int) 15.0.8 and Software Asset Management (sn_itam_samp) 2.1.0 store applications installed, you must delete the entitlements for the existing CrowdStrike integration profiles. Then, create entitlements for various CrowdStrike products, such as Falcon Endpoint Protection and Falcon Discover, based on their license metrics. These metrics include Reserved Hourly Average Sensor and Sensor Subscription, which are found under the CrowdStrike license metric group.

- If any existing CrowdStrike profiles are in the **Draft** state, create integration profiles and delete the existing ones.
- If any existing CrowdStrike profiles are in the **Published** state, their state changes to Draft.

If you are on any version for Yokohama below patch 1, refer KB1801232.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **CrowdStrike Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
	c. Select **CrowdStrike** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration profile form

Field	Value
Display name	Name of the integration profile. For example, CrowdStrike integration.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to #**Draft**. ○ If you have already published the integration profile, this field is automatically set to#**Published**.
Profile type	Type of integration profile. This field is automatically set to CrowdStrike Subscription.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for the process to minimize security risks and optimize SaaS licenses.

Note: The **Download consumption** check box is selected by default and you can't clear it. Verify that the **Subflow** field is set to **CrowdStrike Download Weekly and Hourly Sensor Usage**.

For more information about the required roles and scopes, see Minimal user permissions table.

4. Select **Save**.
A draft integration profile is created.

The **Connection & Credential** field appears and is automatically set to **sn_crowdstrk_spoke.CrowdStrike**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Value
Connection Information	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Connection Name	Name of the CrowdStrike connection. This field populates automatically.
Connection URL	URL for the connection. This field is automatically set to `https://api.crowdstrike.com`. Each CrowdStrike cloud has a different base URL. Use the base URL that corresponds to the cloud where your integration is hosted. ○ **US-1**: `https://api.crowdstrike.com` ○ **US-2**: `https://api.us-2.crowdstrike.com` ○ **EU-1**: `https://api.eu-1.crowdstrike.com`
Credential Information	
OAuth Client ID	Client ID that you generated while configuring the CrowdStrike API settings.
OAuth Client Secret	Client Secret that you generated while configuring the CrowdStrike API settings.
OAuth Redirect URL	`https://<instance name>/oauth_redirect.do`, where the instance name is the name of your ServiceNow instance.

8. Select **Create and Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

   The OAuth token is generated successfully.

9. On the Integration Profile form, proceed with the Workload product mapping by selecting the **CrowdStrike Product Workload Mappings** tab.

   Note: The software entitlements and software models must be created before proceeding to the next step.

   - For more information on creating software entitlements in the Software Asset Management classic application, see Create entitlements in Software Asset Management classic.
   - For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
   - For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

   a. On the CrowdStrike Product Workload Mappings page, select **New**.

   b. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For further details on the CrowdStrike Product Workload Mapping, see Create a product workload mapping for CrowdStrike products.

c. Select **Save**.

10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
You can also validate connections before creating CrowdStrike product workload mappings.

> **Important:** You must create the product workload mapping before publishing the profile.

11. After the connection is verified and the workload product mapping is provided, select **Publish**.
12. In the Publish Confirmation dialog box, select **OK**.

Result

This integration pulls or creates usage records in the CrowdStrike Product Usage [samp_crowdstrike_product_usage] table and CAL records in the Client Access [samp_sw_client_access] table.

What to do next

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

You can view details on the usage records and workload mappings created with the CrowdStrike integration. For more information, see License operations view in the Software Asset Workspace.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Docusign

Integrating your Software Asset Management application with the Docusign service enables you to track your software subscriptions and to reclaim unused licenses.

You can integrate your Software Asset Management application with the Docusign service at Organization level and Account level. However, an integration profile can be either at the Organization level or Account level.

- Integrate with Docusign at Organization level
- Integrate with Docusign at Account level

Integrate with Docusign at Organization level

Integrating your Software Asset Management application with the Docusign service at the organization level enables you to track your software subscriptions and envelope consumption data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Integration with Docusign at the organization level is done using the Data feed API, so the user's last activities aren't tracked as part of this integration.

For more information about the Docusign service, see the DocuSign Developer site.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Docusign application	Authentication scopes
Download subscriptions	admin	No scopes
Download consumption	admin	No scopes

This process is applicable for Zurich patch 4, Software Asset Management - SaaS License Management (sn_sam_saas_int) 16.0.8, and Software Asset Management (sn_itam_samp) 2.1.0 version onwards.

Register a Docusign application

Register a Docusign application through the Docusign admin portal.

Before you begin
Docusign Role required: admin

Procedure

1. Log in to your Docusign demo (non-production) account.
   You can use any subaccount for logging in that is later promoted to the corresponding production account.
2. Go to the Admin tab.
   - If you already have an API integration key from a previous integration ready for use in production, skip to step 15.
   - If you don't have your API integration key saved, you must generate a new one.
3. On the side navigation pane, select **Account Profile** and copy the **Organization ID** to secure it for later use.
4. Navigate to **INTEGRATIONS** > **Apps and Keys**.
5. In the **Apps and Integration Keys** section, select **Add App and Integration Key**.
6. On the Add Integration Key form, enter a unique name for your application in the **App Name** field and select **CREATE APP**.
7. On the profile page of your application, select **Third-party integration key** in the **Integration Type** field.
8. Copy the value of the **Integration Key** and secure it for later use.

   Important: You must request the Docusign support team for enabling the Data feed API on the integration key that you're generating. If you're using an Enterprise Pro plan, the Data feed API is free for you with organization management. If you're using a low-tier plan, you can opt for organization management as an add-on. For further information, contact the Docusign support team.

9. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

10. In the **Apps and Integration Keys** section, locate the application that you just created in the App Name list.
11. Select **Actions** > **Select Go-Live account**.
    A Docusign login window pops up prompting you to enter the credentials for your Docusign account.
12. Enter your Docusign credentials.
13. Select a production account on the window that pops up prompting you to choose a production account to which you want to promote your integration key.
    The **Go Live Status** field changes to **Pending approval**. For a successful Go-Live review, your app must meet the requirements for Go-Live for each API that it uses. For more information on the Go-Live review stages, see Docusign documentation.
14. After the integration is approved, the **Go Live Status** changes to **View in production**.
15. Log in to your Docusign production account and verify that the same integration key has been promoted to the production account.

Generate RSA keypair for Docusign integration

Generate RSA keys to integrate the Docusign application with your ServiceNow instance.

Before you begin

Docusign requirements:

- Docusign account
- Docusign app configured to integrate with ServiceNow
- Role required: Docusign administrator

About this task

The integration of Docusign at the organization level enables access to all subaccounts using a single integration key generated in any one subaccount.

Procedure

1. Log in to your Docusign production content account.
2. Go to the Admin tab.
3. Navigate to **INTEGRATIONS** > **Apps and Keys**.
4. Next to your application, select **Actions** > **Edit**.
5. Select **Generate RSA** and save the Key Pair ID, Public Key, and Private Key for later use.

Generate a Java Key Store certificate

Generate a Java Key Store (JKS) certificate for the JSON Web Token (JWT) authentication of your Docusign integration profile.

Before you begin

Role required: admin

Procedure

1. Open a text editor for code, such as Sublime Text, and create a file.
2. Paste the Private key that you had generated from your Docusign integrator app.

   For more information, see Generate RSA keypair for Docusign integration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Make sure to include both the beginning and ending of the private key.

3. Save the file with the .key extension.
   For example, `privatekey.key`.
4. Open the command line interface (CLI) and navigate to the directory where you saved the file with the .key extension.
5. Create a CA signed certificate using your private key by executing the command:

```
openssl req -new -x509 -key <file-name>.key -out
 <certificate-name>.pem -days 1095
```

   You're prompted to provide details such as country name and province name.
6. Enter the required details.
7. Create a PKCS 12 file using your private key and CA signed certificate by executing the command:

```
openssl pkcs12 -export -in <certificate-name>.pem -inkey
 <file-name>.key -certfile <certificate-name>.pem -out
 <PKCS-12-file-name>.p12
```

   You're prompted to provide a password for the file.
8. Enter the export password or the source keystore password.
9. Create the JKS file by executing this command:

```
keytool -importkeystore -srckeystore
 <PKCS-12-file-name>.p12 -srcstoretype pkcs12 -destkeystore
 <JKS-certificate-filename>.jks -deststoretype JKS
```

   You're prompted to provide a password for the JKS file.
10. Provide the same password for the destination and source keystore passwords.

Create a Docusign integration profile at Organization level

Create an integration profile to track software subscriptions and optimize licensing for the Docusign service.

Before you begin

To create a Docusign integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

Role required: sam_integrator

About this task

An organization level integration profile uses the Docusign Data Feed API that retrieves detailed subscription and consumption data across an entire organization. The Data Feed API aggregates data from all subaccounts under an organization, offering a centralized view of envelope activity and usage.

How Data feeds work:

- Data feeds are updated nightly based on the site the accounts are in.
- Data for each account is processed every seven days.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If an organization has multiple accounts, each account is processed on a different weekday. The system randomly selects a few accounts to process each day, so that data is processed daily but for different accounts. For example, Accounts 1 and 2 on Monday, Accounts 3, 4, and 5 on Tuesday, and so on.

Even if the integration job runs on the same day the envelopes are sent, the data feeds for those envelopes may not be available. After the data feeds are generated, they are included in the API response. The scheduled job then processes those envelopes during its next run.

If you're using Software Asset Workspace, the option to create the Docusign integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

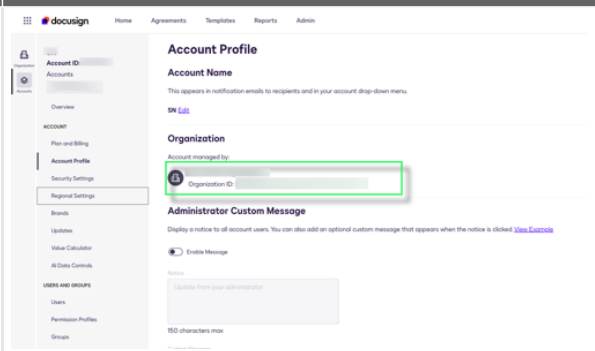
Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **DocuSign Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **DocuSign** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `DocuSign Integration`
Integration type	The default value is set to **Organization Level**.
Contract start date	The date on which the contract agreement became effective. This date isn't the same as the date when your Docusign account was created.
Profile type	Type of integration profile. This value is automatically set to **DocuSign Subscription**.
Organization Id	The organization ID to which this account belongs. You can find this value in your Docusign account on the Admin tab. Navigate to **Account Profile** and copy the **Organization ID**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	
Renewal period (months)	The frequency at which envelope consumption gets renewed. For example, if you enter a renewal period of three months, then the consumption data is renewed every three months. The renewal period governs the consumption cycle and is separate from the overall contract term.

3. Review the required user roles or API permissions specified in the **Process configuration** field for each process to reduce security risks and optimize SaaS licenses.

   Note: For more information about the required roles and scopes, see the Minimal user permissions table.

   The **Download subscriptions** check box is selected by default and you can't clear it.

   The **Download Consumption** check box is selected by default. You can check the detailed consumption data in the Docusign consumption [samp_docusign_consumption] table. The data in this consumption table is in UTC time zone.

4. Select **Submit**.
   A draft integration profile is created.

   The **Connection & Credential** field appears and is automatically set to **sn_sam_saas_int.Docusign_OAuth_with_JWT**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Information	
Connection Name	Name of the connection.
Connection URL	This field is automatically set to **https://api.docusign.net**.
Credential Information	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Integration Key	The API integration key that you generated in the Register a Docusign application procedure.
Key Pair ID	The key pair ID of the private key that you generated in the Generate RSA keypair for Docusign integration procedure.
Audience URI	Enter `account.docusign.com` as the URI.
Keystore Password	Password associated with the uploaded JKS file that you created in the Generate a Java Key Store certificate procedure.

8. Locate the JKS file on your device by selecting **Keystore**.

   For more information on creating the JKS file, see Generate a Java Key Store certificate.

9. Select **Create and Get OAuth Token**.
10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
    Validating the connection verifies the Download Subscriptions APIs.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Scheduled Jobs
- Scheduled Job Results
- Unrecognized Subscription Identifiers
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Create software entitlements for the automatically generated software models to track used software against owned software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrate with Docusign at Account level

Integrating your Software Asset Management application with the Docusign service enables you to track your software subscriptions and to reclaim unused licenses.

Docusign purchases made through resellers don't reflect within the Docusign standard billing system. So no values are returned through the APIs for envelope consumption that is available to ServiceNow.

Important: Docusign has removed the **lastLogin** field from the Users API, so the user's last activities are no longer tracked as part of this integration. The Software Asset Management application now creates reclamation candidates based on the subscription assigned date.

For more information about the Docusign service, see the DocuSign Developer site.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Docusign application	Authentication scopes
Download subscriptions	admin	No scopes
Reclaim subscription	admin	No scopes

Register a Docusign application

Register a Docusign application through the Docusign admin portal.

Before you begin

Docusign Role required: admin

Procedure

1. Log in to your Docusign demo (non-production) account.
   You can use any subaccount for logging in that is later promoted to the corresponding production account.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Go to the Admin tab.
   - If you already have an API integration key from a previous integration ready for use in production, skip to step 14.
   - If you don't have your API integration key saved, you must generate a new one.
3. On the side navigation pane, select **INTEGRATIONS** > **Apps and Keys**.
4. In the **Apps and Integration Keys** section, select **Add App and Integration key**.
5. On the Add Integration Key form, enter a unique name for your application in the **App Name** field and select **CREATE APP**.
6. On the profile page of your application, select **Third-party integration key** in the **Integration Type** field.
7. Copy the value of the **Integration Key** and secure it for later use.
   Save the Integration Key (Client ID) in a secure location to use it later for integration with the ServiceNow instance.
8. Select **Save**.
9. In the **Apps and Integration Keys** section, locate the application that you just created in the App Name list.
10. Select **Actions** > **Select Go-Live account**.
    A Docusign login window pops up prompting you to enter the credentials for your Docusign account.
11. Enter your Docusign credentials.
12. Select a production account on the window that pops up prompting you to choose a production account to which you want to promote your integration key.
    The **Go Live Status** field changes to **Pending approval**. For a successful Go-Live review, your app must meet the requirements for Go-Live for each API that it uses. For more information on the Go-Live review stages, see Docusign documentation.
13. After the integration is approved, the **Go Live Status** changes to **View in production**.
14. Log in to your Docusign production account and verify that the same integration key has been promoted to the production account.
15. On the side navigation pane, select **INTEGRATIONS** > **Apps and Keys**.
16. Next to your application, select **Actions** > **Edit**.
17. Select **ADD URI** and add `https://`*`ServiceNow instance`*`.service-now.com/oauth_redirect.do`.
18. Select **ADD SECRET KEY**.
    Save the Secret Key (Client secret) for your production account in a secure location to use it later for integration with the ServiceNow instance.
19. Select **Save**.

Create a Docusign integration profile at Account level

Create a Docusign integration profile at Account level to track software subscriptions and optimize licensing for the Docusign service.

Before you begin

To create a Docusign integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

If you're using Software Asset Workspace, the option to create the Docusign integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **DocuSign Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **DocuSign** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `DocuSign Integration`
Integration type	The default value is set to **Account Level**.
Client Id	Client ID for the OAuth application created in the SaaS admin account in the Register a Docusign application procedure.
Redirect url	URL of the OAuth provider that you're redirected to after authentication. This value is automatically populated.
Technical account Id	API Account ID from your Docusign production account.
Instance URL	URL of the login page used for accessing your Docusign production account. This field is automatically set to **https://account.docusign.com**.
Client secret	Password associated with the client ID created in the Register a Docusign application procedure.
Profile type	Type of integration profile. This value is automatically set to **DocuSign Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information about the required roles and scopes, see the Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The **Download subscriptions** check box is selected by default and you can't clear it.
- The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Submit**.
   A draft integration profile is created.
5. On the integration profile, select **Get OAuth Token** and follow the steps to get an OAuth token.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

6. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.

Result

You can view events performed by individual users up to one year prior to the current date. For more information, see Review a software reclamation rule. Software Asset Management pulls the events from the time that you start downloading user subscriptions irrespective of the profile creation date.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Dropbox

Integrating your Software Asset Management application with the Dropbox service enables you to track your software subscriptions and to reclaim unused licenses.

For more information about the Dropbox service, see the Dropbox Business User and Admin Guides.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Dropbox application	Authentication scopes
Download subscriptions	Security Admin	• members.read • team_data.member
Pull user activity	Security Admin	• events.read • team_data.member
Reclaim subscription	Security Admin	• team_info.read • members.write • members.delete

Create a Dropbox application for user subscriptions

Create an application on the DBX Platform for Developers.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Dropbox Role required: Refer to the Minimal user permissions table.

Procedure

1. Navigate to Dropbox Developer Apps and sign in to your account.
2. On the My Apps page, select **Create App**.
3. Select scoped access API.
4. Specify the type of access to **Full Dropbox**.
5. Enter a name for your application and select **Create app**.
6. Select the **Permission** tab.
7. Select these permission check boxes:
   - team_info.read
   - members.write
   - members.delete
   - groups.read
   - events.read
   - team_data.member
8. Select **Submit** to save the changes.
9. Navigate to the **Settings** tab.
10. Obtain the App key and App secret.
    You will need to copy and paste these values into the Client ID and Client Secret fields in your ServiceNow instance in the following steps.

    Note: Your App key (client ID) and App secret (client secret) are sensitive. Do not share them.

11. Enter `https://instance.service-now.com/oauth_redirect.do` as the redirect URI, where *instance* is the name of your ServiceNow instance.
12. Click the **Branding** tab and then click **Save changes**.

Create a Dropbox integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Dropbox service.

Before you begin

To create a Dropbox integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

About this task

If you're using Software Asset Workspace, the option to create the Dropbox integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Using the information from the application with the permissions set to **Team member file access**, return to your ServiceNow instance to create an integration profile.
2. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Dropbox Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Dropbox** from the drop-down list. **d.** Select **Continue**.

3. On the form, fill in the fields.

Integration Profile form

Field	Value
Display name	Name of the integration profile. For example, `DropBox Integration`
Client Id	Client ID for the OAuth application created in the SaaS admin account.
Redirect url	URL of the OAuth provider that you're redirected to after authentication. This value is automatically populated.
Client secret	Password associated with the client ID.
Profile type	Type of integration profile. This value is automatically set to **DropBox Subscription**.
Analyze user activity from	In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile. **Note:** Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date. You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

4. In the Process configuration section, review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: For more information about the required roles and scopes, see Minimal user permissions table.

- The **Download subscriptions** check box is selected by default and you can't clear it.
- The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Events* isn't created.

  In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

  Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

  You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.
- The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

5. Select **Submit** after completing all the required fields.
   Your ServiceNow instance creates a draft integration profile.
6. On the integration profile form, select **Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.
7. Navigate to the Dropbox application.
   - Select **Allow** if you have already logged in to the Dropbox application.
   - If you haven't logged in to the Dropbox application, log in with your admin credentials and then continue with the next steps.

   Note: When user subscriptions are reclaimed, files from the reclaimed accounts are transferred to the admin account selected in this step. This account can be a different admin account than the one used to set up the integration. If you have to start transferring files to a new admin, you can select the **Get OAuth Token** related link again at any time to select a different admin account. After selecting a new admin, you can reclaim the old admin account to transfer all of their files to the new admin, including all previously reclaimed user files.
8. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

Note: If you clear the **Download Activity** check box after the integration profile is validated and scheduled jobs are created, you must revalidate the connections because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Events* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Google Workspace

Integrating your Software Asset Management application with the Google Workspace service enables you to track your software subscriptions and to reclaim unused licenses.

For additional information about the Google Workspace service, see Google Workspace Admin Help.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Google Workspace application	Authentication scopes
Download subscriptions	Admin API privileges: Users Read	• [Admin SDK API] `https://www.googleapis.com/auth/admin.directory.user.readonly` • [Admin SDK API] `https://www.googleapis.com/auth/admin.directory.domain.readonl` • [Enterprise License Manager API] `https://www.googleapis.com/auth/apps.licensing`
Pull user activity	Admin API privileges: Users Read	• [Admin SDK API] `https://www.googleapis.com/auth/admin.directory.user.readonly` • [Admin SDK API] `https://www.googleapis.com/auth/admin.reports.usage.readonly`
Reclaim subscription	Super Administrator	• [Admin SDK API] `https://www.googleapis.com/auth/admin.directory.user.readonly` • [People SDK API] `https://www.googleapis.com/auth/userinfo.email` • [People SDK API] `https://www.googleapis.com/auth/userinfo.profile` • [Admin SDK API] `https://www.googleapis.com/auth/admin.datatransfer.readonly`

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc. in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a Google Workspace project

Create a project in the Google API Console.

Before you begin

Google Workspace Role required: Refer to the Minimal user permissions table.

Procedure

1. Log in to Google API Console.
2. Select **Select a project** > **New Project**.
3. Enter a name for your project in the **Project name** field, then select your Organization and Location.
4. Select **Create**.
5. Select **OAuth consent screen** on the side navigation menu.
6. If you haven't configured Google Auth Platform yet, select **Get started**.
7. Enter the App name and select User support email in the App information section.
8. Select **Next**.
9. In the Audience section, select **Internal** as the user type and select **Next**.
10. In Authorized domains, select the **ADD DOMAIN** button and add `service-now.com`.
11. Enter your email address in the Developer contact information section.
12. Select **Save and Continue** to add scopes.
13. On the Scopes page, select the **Add or Remove Scopes** button.
14. In the Manually add scopes section, enter the following scopes by pasting them to the text area:
    - `https://www.googleapis.com/auth/apps.licensing`
    - `https://www.googleapis.com/auth/admin.directory.user`
    - `https://www.googleapis.com/auth/admin.directory.user.readonly`
    - `https://www.googleapis.com/auth/admin.directory.domain.readonly`
    - `https://www.googleapis.com/auth/admin.datatransfer`
    - `https://www.googleapis.com/auth/admin.datatransfer.readonly`
    - `https://www.googleapis.com/auth/admin.reports.usage.readonly`
    - `https://www.googleapis.com/auth/userinfo.profile`
    - `https://www.googleapis.com/auth/userinfo.email`
15. Select **ADD TO TABLE** and then select **Update**.
16. Select **Save and Continue**.
17. Select **Credentials** on the side navigation menu and select **CREATE CREDENTIALS**.
18. Select **OAuth client ID**.
19. Fill out the form as shown and select **Create**.

Field	Value
Application type	Web application

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Note: Selecting a value for this field causes the remaining fields to be displayed.	
Name	Any name of your choice
Authorized JavaScript origins	https://*instance*.service-now.com, where *instance* is the name of your ServiceNow instance
Authorized redirect URIs	https://*instance*.service-now.com/oauth_redirect.do, where *instance* is the name of your ServiceNow instance

20. Select **OK**.
    You can now view your client ID and client secret that you would use in your ServiceNow instance.

    Note: Your client ID and client secret are sensitive. Don't share them.

21. Select **Library** on the side navigation menu.
    Search for and enable the following APIs:
    - Enterprise License Manager API
    - Admin SDK
    - Google People API

Create a Google Workspace integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Google Workspace service.

Before you begin

To create a Google Workspace integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

About this task

If you're using Software Asset Workspace, the option to create the Google Workspace integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Google Workspace Integration Profile**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Google Workspace** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Value
Display name	Name of the integration profile. For example, *`Google Workspace Integration`*
Client Id	Client ID for the OAuth application created in the SaaS admin account.
Redirect url	URL of the OAuth provider that you're redirected to after authentication. This value is automatically populated.
Client secret	Password associated with the client ID.
Profile type	Type of integration profile. This value is automatically set to *`Google Workspace`* **Subscription**.

3. In the Process configuration section, review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information about the required roles and scopes, see Minimal user permissions table.

- The **Download subscriptions** check box is selected by default and you can't clear it.
- The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *`SAM - Refresh <displayname> Events`* isn't created.

  In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

  Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

  You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Submit** after completing all the required fields.
   Your ServiceNow instance creates a draft integration profile.
5. On the integration profile, select **Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

6. In the pop-up window, select your Google admin account and select **Allow**.

   Note: When user subscriptions are reclaimed, files from the reclaimed accounts are transferred to the admin account selected in this step. This account can be a different admin account than the one used to set up the integration. If you have to start transferring files to a new admin, you can select the **Get OAuth Token** related link again at any time to select a different admin account. After selecting a new admin, you can reclaim the old admin account to transfer all of their files to the new admin, including all previously reclaimed user files.

7. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

   Note: If you clear the **Download Activity** check box after the integration profile is validated and scheduled jobs are created, you must revalidate the connections because the following events occur:

   - The **Status** field on the integration profile form changes to **Draft**.
   - The **Validate connection** button shows up on the form.
   - The current *SAM - Refresh <displayname> Events* job gets deleted.

Result

You can view events performed by individual users up to one year prior to the current date. For more information, see Review a software reclamation rule. Software Asset Management pulls the events from the time that you start downloading user subscriptions irrespective of the profile creation date.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with GitHub

Integrating your Software Asset Management application with the GitHub repository hosting service enables you to track your software subscriptions and reclaim unused licenses.

With this integration, you can retrieve and analyze licensing information for both the GitHub Enterprise Cloud and GitHub Enterprise Server applications.

- Integrate with GitHub Enterprise Cloud
- Integrate with GitHub Enterprise Server

Integrate with GitHub Enterprise Cloud

Integrating your Software Asset Management application with the GitHub Enterprise Cloud application help you track your software subscriptions and reclaim unused licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the GitHub Enterprise Cloud application	Authentication scopes
Download subscriptions	Organization owner	read:org
Pull user activity	Organization owner	• read:org • repo • read:audit_log
Reclaim subscription	Organization owner	write:org

The GitHub Enterprise Cloud integration is currently limited to users with Enterprise plans only.

Generate an API access token for GitHub Enterprise Cloud

Generate a token that you can use to access the GitHub Enterprise Cloud API.

Before you begin

GitHub Role required: organization owner

The user account that you use for authentication should be able to read all repositories in the organization they're a part of.

About this task

The GitHub repository hosting service uses personal access tokens to grant users access to the GitHub API. Personal access tokens function similarly to OAuth access tokens by authorizing API requests. By generating a personal access token to authorize your GitHub Enterprise Cloud API requests, you can gain access to the GitHub Enterprise Cloud API.

Procedure

1. From a web browser, open GitHub.
2. Sign in to your GitHub account.
3. On the GitHub page header, select your profile photo and then select **Settings**.
   Your profile settings open.
4. From the side navigation pane, select **Developer Settings**.
   Your developer settings open.
5. From the side navigation pane, select **Personal access tokens**.
6. Select **Tokens (classic)**.
7. On the Personal access tokens page, select **Generate new token**.
8. Select **Generate new token (classic)**.
9. If you're prompted to confirm your password before proceeding, enter your GitHub password and then select **Confirm password**.
10. On the New personal access token form, describe the purpose of the token in the **Note** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

11. To give your token an expiration, select the **Expiration** drop-down menu and select a default value or use the calendar picker.
12. In the Select scopes form section, enable the repo, write:org, read:org, and read:audit_log OAuth scopes.
    OAuth scopes limit the level of access that the application has to your protected resources. The repo OAuth scope gives you full control of your private repositories. The write:org and read:org OAuth scopes enable you to manage your entire organization, including all teams, projects, and memberships. The read:audit_log OAuth scope gives you access to the audit log data to track accurate user activity. See Scopes for OAuth Apps for more information about GitHub OAuth scopes.

    a. Enable the repo OAuth scope by selecting the **repo** check box.
       By enabling this OAuth scope, you automatically enable the repo:status, repo_deployment, public_repo, repo:invite, and security_events OAuth scopes.

    b. Enable the write:org and read:org OAuth scope.

    c. Enable the read:audit_log OAuth scope.

13. Select **Generate token**.
    Your personal access token generates.
14. Copy the access token and save it in a secure location for later use.
15. To use your token to access resources owned by an organization that uses SAML single sign-on, authorize the token.
    For more information, see Authorizing a personal access token for use with SAML single sign-on.

Create a GitHub Enterprise Cloud integration profile

Create a GitHub Enterprise Enterprise Cloud integration profile to track software subscriptions and optimize licensing for your GitHub Enterprise Cloud applications.

Before you begin

To create a GitHub Enterprise Cloud integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **GitHub Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

If you're upgrading from Yokohama or Zurich release, then you must reconfigure your GitHub Enterprise Cloud integration profile.

About this task

If you’re using Software Asset Workspace, the option to create the GitHub Cloud integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **GitHub Cloud Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **GitHub Cloud** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `GitHub Cloud Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This field is automatically set to **github_cloud_subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **GitHub Cloud Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   Software Asset Management pulls the members, outside collaborators, pending invitations, and pending outside collaborators to provide a complete view of your GitHub Enterprise Cloud Subscriptions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

> **Important:** To pull pending outside collaborators, enable the *sn_sam_saas_int.pull_pending_collaborator_github* system property. A higher number of repositories would lead to an increased number of API transactions.

b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **GitHub Cloud Update User Activity**.

> **Note:** The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

> **Note:** Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

> **Tip:** To avoid performance issues with this subflow, the best approach is to set the **Analyze user activity from** field to a maximum of seven days before the current date.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **GitHub Cloud Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_github_spoke.GitHub**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Name	Name of the GitHub connection.
Connection URL	URL of the GitHub API endpoint.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Enter `https://api.github.com`.
Use MID Server	Option that enables your ServiceNow instance to use a MID Server for communication with your GitHub Enterprise Cloud applications. ○ If your instance requires a MID Server, set this field to `true`. ○ If your instance doesn't require a MID Server, leave this field empty. **Important:** To enable this option, you must already have a MID Server set up on your instance. See MID Server for detailed instructions.
API Key	Personal access token that enables you to access the GitHub Enterprise Cloud API. ○ If the GitHub spoke version installed is 2.2.5 or higher, enter `<api-key>`. ○ If the GitHub spoke version installed is lower than 2.2.5, enter `Bearer <api-key>`. The *<api-key>* is the personal access token that you generated in Generate an API access token for GitHub Enterprise Cloud

8. Select **Create**.
9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.
10. After the connection is verified, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrate with GitHub Enterprise Server

Integrating your Software Asset Management application with the GitHub Enterprise Server application help you track your software subscriptions and reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the GitHub Enterprise Server application	Authentication scopes
Download subscriptions	site admininistrator	site_admin
Reclaim subscription	site admininistrator	site_admin

Generate an API access token for GitHub Enterprise Server

Generate a token that you can use to access the GitHub Enterprise Server API.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
GitHub Role required: site administrator

About this task
The GitHub repository hosting service uses personal access tokens to grant users access to the GitHub API. Personal access tokens function similarly to OAuth access tokens by authorizing API requests. By generating a personal access token to authorize your GitHub Enterprise Server API requests, you can gain access to the GitHub Enterprise Server API.

Procedure
1. From a web browser, open your GitHub Enterprise Server instance.
2. Sign in to your GitHub account.
3. On the GitHub page header, select your profile photo and then select **Settings**.
   Your profile settings open.
4. From the left navigation pane, select **Developer Settings**.
   Your developer settings open.
5. From the left navigation pane, select **Personal access tokens**.
6. On the Personal access tokens page, select **Generate new token**.
7. If you're prompted to confirm your password before proceeding, enter your GitHub password and then select **Confirm password**.
8. On the New personal access token form, describe the purpose of the token in the **Note** field.
9. In the Select scopes form section, enable the site_admin OAuth scope by selecting the **site_admin** check box.
   OAuth scopes limit the level of access that the application has to your protected resources. The site_admin OAuth scope enables you to manage your enterprise users, organizations, and repositories.
10. Select **Generate token**.
    Your personal access token generates.
11. Copy the access token and save it in a secure location for later use.

Create a GitHub Enterprise Server integration profile

Create a GitHub Enterprise Server integration profile to track software subscriptions and optimize licensing for your GitHub Enterprise Server applications.

Before you begin
To create a GitHub Enterprise Server integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **GitHub Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task
If you're using Software Asset Workspace, the option to create the GitHub Server integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **GitHub Server Subscription Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **GitHub Server** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `GitHub Server Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This field is automatically set to **github_server_subscription**.

3. In the Process configuration section, review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information about the required roles and scopes, see Minimal user permissions table.

   ○ The **Download subscriptions** check box is selected by default and you can't clear it.

   ○ **Note:** The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

   In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

prior to the current date and view events performed by individual users from the time you create this profile.

Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

- The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_github_spoke.GitHub_Server**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Name	Name of the GitHub connection.
Connection URL	URL of the GitHub API endpoint. Enter `https://api.github.com`.
Use MID Server	Option that enables your ServiceNow instance to use a MID Server for communication with your GitHub Enterprise Cloud applications. ○ If your instance requires a MID Server, set this field to `true`. ○ If your instance doesn't require a MID Server, leave this field empty. **Important:** To enable this option, you must already have a MID Server set up on your instance. See MID Server for detailed instructions.
API Key	Personal access token that enables you to access the GitHub Enterprise Cloud API. ○ If the GitHub spoke version installed is 2.2.5 or higher, enter `<api-key>`. ○ If the GitHub spoke version installed is lower than 2.2.5, enter `Bearer <api-key>`. The *<api-key>* is the personal access token that you generated in Generate an API access token for GitHub Enterprise Server.

8. Select **Create**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

10. After the connection is validated, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

> **Note:** If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:
>
> - The **Status** field on the integration profile form changes to **Draft**.
> - The **Validate connection** button shows up on the form.
> - The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with GoTo

Integrating your Software Asset Management application with GoTo applications enable you to track your software subscriptions and reclaim unused licenses.

With this integration, you can retrieve and analyze licensing information for the following GoTo applications:

- GoToMeeting (user subscriptions, user activity, and reclamation candidates)
- GoToWebinar (user subscriptions, user activity, and reclamation candidates)
- GoToConnect (user subscriptions, user activity, and reclamation candidates)
- GoToTraining (user subscriptions only)
- GoToAssist (user subscriptions only)
- OpenVoice (user subscriptions only)

Use this information to manage and optimize your GoTo license position.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the GoTo application	Authentication scopes
Download subscriptions	LogMeIn developer account and admin role	• Profile • Admin Center
Pull user activity	LogMeIn developer account and admin role	• Profile • Admin Center • GoToConnect
Reclaim subscription	LogMeIn developer account and admin role	Admin Center

Create a GoTo OAuth client

Create an OAuth client for authenticating GoTo API requests.

Before you begin

GoTo Role required: Refer to the Minimal user permissions table.

Procedure

1. From a web browser, open the GoTo Developer Center.
2. Sign in using your LogMeIn developer account.
   If you have not already set up a LogMeIn developer account, see How to login or create a developer account for detailed instructions.
3. From the LogMeIn Developers home page, select the **OAuth Clients** tab.
4. Select **Create a client**.
5. On the Details tab of the Create client form, fill in the client details.

Details tab

Field	Description
Client name	Name of the OAuth client.
Description	Optional description for the OAuth client.
Redirect URLs	Redirect URL of the ServiceNow instance on which you're integrating your GoTo applications. Enter `https://<instance-url>/oauth_redirect.do`, where <*instance-url*> is the URL of your ServiceNow instance.

6. Select **Next**.
7. On the Scopes tab, specify the level of access that the OAuth client has to your GoTo users and applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scopes tab

Field	Description
Profile	OAuth scopes for getting and modifying user information for your authenticated users. The **Get user information** scope is enabled automatically. Select the check box to enable the **Modify user details** scope.
GoToMeeting, GoToWebinar, or GoToTraining	OAuth scope for creating, starting, and modifying sessions for your GoToMeeting, GoToWebinar, and GoToTraining applications. Select the check box to enable this scope. **Note:** The SaaS License Management GoTo integration doesn't support license management for the GoToTraining application.
GoToAssist Remote Support or Service Desk	OAuth scope for creating, starting, and modifying sessions for the GoToAssist Remote Support and Service Desk applications. Leave this check box unselected. **Note:** The SaaS License Management GoTo integration doesn't support license management for the GoToAssist applications.
SCIM	OAuth scope for automating user management using the System for Cross-domain Identity Management (SCIM) protocol. Leave this check box unselected.
Admin Center	OAuth scope for managing LogMeIn users through the GoTo Admin Center. Select the check box to enable this scope.
GoToConnect	OAuth scope for initiating phone calls and other telephone services using the GoToConnect. If GoToConnect license is enabled, select these check boxes: ○ Access call history for phone lines in the PBX [cr.v1.read] ○ Retrieve your phone line information [users.v1.lines.read]

8. Select **Save**.
9. On the Credentials tab, copy the values in the **Client ID** and **Client secret** fields. Save them in a secure location for later use.
10. Select the check box to verify that you have stored the client secret.
11. Select **Done**.

Create a GoTo integration profile

Create a GoTo integration profile to track software subscriptions and optimize licensing for your GoTo applications.

Before you begin

To create a GoTo integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You must select the **GoTo Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the GoTo integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **GoTo Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **GoTo** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the following fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `GoTo Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to `GoTo Subscription`.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **GoTo Download Subscriptions**.

   This subflow is used for all supported GoTo applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **GoTo Update User Activity**.

This subflow is used for only the GoToMeeting and GoToWebinar applications.

Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **GoTo Reclaim Subscription**.

This subflow is used for only the GoToMeeting and GoToWebinar applications.

Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
Your ServiceNow instance creates a draft integration profile.

The **Connection & Credential** field appears and is automatically set to **sn_goto_spoke.GoTo**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Name	Name of the connection.
OAuth Client ID	Client ID that is assigned to your GoTo application.
OAuth Client Secret	Client secret that is assigned to your GoTo application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This field populates automatically based on the OAuth redirect URL that you specified in Create a GoTo OAuth client.

8. Select **Create and Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

9. In the Authorize App dialog box, select **Allow**.
10. Select **Allow**.
    The OAuth access token becomes available for authorizing your GoTo connection.
11. If GoToConnect license is enabled, navigate to the Connections tab.
12. Find the connection for GoToConnect and select **View Details**.
13. Select **Get OAuth Token** to generate a token for GoToConnect.
14. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

15. After the connection is verified, select **Publish**.
16. In the Publish Confirmation dialog box, select **OK**.

    Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

    - The **Status** field on the integration profile form changes to **Draft**.
    - The **Validate connection** button shows up on the form.
    - The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Jira Software Cloud

Integrating your Software Asset Management application with Atlassian Jira Software Cloud enables you to track your software subscriptions and to reclaim unused licenses.

Note: Currently this integration supports only one site integration per profile.

- If your installed Jira spoke version is 4.1.0 or higher, you can integrate Jira with your ServiceNow instance by using one of the following methods:
  - Basic authentication
  - OAuth 2.0
- If your installed Jira spoke version is lower than 4.1.0, integrate Jira with your ServiceNow instance by Basic authentication method.

Integrate with Jira Software Cloud using basic authentication

Integrate the Software Asset Management application and Jira using an API key to authenticate ServiceNow requests.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Jira Software Cloud application	Authentication scopes
Download subscriptions	Permission to access Jira	None
Pull user activity	• Administer Jira global permission • Browse projects permission for the project containing the issue. If issue-level security is configured, issue-level security permission to view the issue.	None
Reclaim subscription	Site administration, that is, member of the site-admin group	None

You can integrate a ServiceNow instance with multiple Jira instances. For this integration, create a connection and credential alias record and a connection record for each Jira instance.

Create a Jira account API token

Create an API token in Jira to authenticate requests.

Before you begin

Jira Role required: Refer the Minimal user permissions table.

Procedure

1. Navigate to Atlassian API Tokens.
2. Select **Create API token**.
3. Enter a name for your API token, then select **Create**.
4. Copy the API token and save it.
   You'll use the token later.

Create the child alias record for Jira

Configure the default connection and credential alias record to authenticate the requests from ServiceNow.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
2. Open the alias record for Jira that is shipped with the spoke.
   Verify that the ID of the alias record is **sn_jira_spoke_jira**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Create the child alias by navigating to the Related Links section and selecting the Child Aliases tab.
   The **Application scope** must be Jira Spoke.
4. Select **New**.
5. Enter a unique and descriptive name for the child alias.
6. Select **Submit**.

Result
The child alias appears in the list on the Child Aliases tab. You can select the child alias and verify the values in the **ID** and **Application** fields.

Create a Jira Software Cloud integration profile

Create an integration profile to track software subscriptions and optimize licensing for Atlassian Jira Software Cloud.

Before you begin
To create a Jira integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

To enable the integration profile to retrieve and update user activity through the Jira Update User Activity subflow, set the *com.glide.transform.json.max-partial-length* system property **Value** to `32768`.

Atlassian Role required: site admin

ServiceNow Role required: sam_integrator

Important: You must select the **Jira Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task
If you're using Software Asset Workspace, the option to create the Jira integration profile in Core UI is inactive.

Procedure
1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Jira Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Jira** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration Profile form

Field	Value
Display name	Name of your choice. For example, Jira integration.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Jira Subscription. This field is automatically populated.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see the Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Jira Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Jira Update User Activity**.

      Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

      In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

      Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

      You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

   c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Jira Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   A draft integration profile is created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The **Connection & Credential** field appears and is automatically set to **sn_jira_spoke.jira_subscription_activity_reclaim**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting the child alias that you had created in Create the child alias record for Jira.
6. Select **Save**.
7. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
8. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
9. On the form, fill in the fields.

Create Connection and Credential form

Field	Description
Connection URL	URL of your Jira instance in `https://api.atlassian.com/ex/jira/<Cloud-Id>` format.
User Name	Email address of the user.
API Key	The API token that you generated for Jira.

10. Select **Create**.
11. On your ServiceNow instance, specify the groups that have access to Jira products.
    By specifying these groups on your ServiceNow instance, you can retrieve data and manage licenses for only the users within these groups.

    a. In a new tab, open the Atlassian Administration portal.

    b. Log in to your site admin account.

    c. Select the **Select** button against the required organization.

    d. On the side navigation pane, select **Apps** > **Atlassian apps**.

    e. On the Atlassian apps page, select **Manage app** on the Jira product row.

    f. View the list of groups that have access to Jira Software.
    Secure this information for later use.

    g. Return to your ServiceNow instance and navigate to **Jira** > **Jira Groups**.

    h. On the Jira Groups form, select the **Add Groups** related link.
    The Add Jira Groups dialog box opens.

    i. In the Available list, select the groups that have access to Jira products.

    Tip: The Available list includes all groups that are associated with your Atlassian account. Select only the groups that have access to Jira products.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

j. Select the right arrow button to move the groups from the Available list to the Selected list.

k. Select **OK**.

12. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

13. After the connection is verified, select **Publish**.
14. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple Jira integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrate with Jira Software Cloud using OAuth 2.0

Integrate the Software Asset Management application with your Jira account using OAuth to authenticate ServiceNow requests.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Jira Software Cloud application	Authentication scopes
Download subscriptions	Permission to access Jira	• read:user:jira • read:group:jira • read:avatar:jira
Pull user activity	• Administer Jira global permission • Browse projects permission for the project containing the issue. If issue-level security is configured, issue-level security permission to view the issue.	• read:jira-user • read:audit-log:jira • read:jira-work
Reclaim subscription	Site administration, that is, member of the site-admin group	• read:group:jira • manage:jira-configuration

Create an OAuth 2.0 integration in Jira account

Create an OAuth 2.0 integration in the Atlassian Developer console to authenticate the requests.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Jira Role required: Refer the Minimal user permissions table.

Procedure

1. Log in to Atlassian Developer console.
2. Under **My apps**, select **Create** and select **OAuth 2.0 integration**.
3. On the form, provide a name for the integration and select **Create**.

   The integration is created and the value of App ID is displayed.
4. Select **Authorization**.

   a. Select **Add** under **Action**.

   b. In **Callback URL**, provide the URL of your ServiceNow instance in this format: `https://<ServiceNow-Instance-Name>.service-now.com/oauth_redirect.do`. For example, `https://example.service-now.com/oauth_redirect.do`.

   c. Select **Save changes**.
5. Select **Settings**.
6. Under **Authentication details**, copy the values of Client ID and Client Secret.
7. Select **Permissions** > **Jira API** > **Configure**.
8. Select the **Granular scopes** tab.
9. Select **Edit Scopes** to add the following scopes:
   - read:application-role:jira
   - read:group:jira
   - read:user:jira
   - read:avatar:jira
   - read:audit-log:jira
   - read:issue-details:jira
   - read:field-configuration:jira
   - read:issue-meta:jira
   - write:group:jira

   You can configure other scopes according to your requirement.

Obtain the Cloud ID value of Jira instance

Obtain the value of the Cloud ID of the Jira cloud instance. This value is required during the configuration of the connection record in your ServiceNow instance.

Before you begin

Jira Role required: admin

Procedure

1. Log in to Atlassian Administration.
2. Select the **Select** button against the required organization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the side navigation pane, select **Apps** > **Atlassian apps**.
4. On the Atlassian apps page, select **Manage app** on the Jira product row.

   The URL is in the following format in a new window: `https://admin.atlassian.com/o/<orgID>/atlassian-apps/jira-software/<Cloud-Id>`.
5. Copy the value of Cloud ID and secure it for later use.

Create a Jira Software Cloud integration profile

Create an integration profile to track software subscriptions and optimize licensing for Atlassian Jira Software Cloud.

Before you begin

To create a Jira integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

To enable the integration profile to retrieve and update user activity through the Jira Update User Activity subflow, set the *com.glide.transform.json.max-partial-length* system property **Value** to `32768`.

Atlassian Role required: site admin

ServiceNow Role required: sam_integrator

Important: You must select the **Jira Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Jira integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Jira Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Jira** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration Profile form

Field	Value
Display name	Name of your choice. For example, Jira integration.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Jira Subscription. This field is automatically populated.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see the Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Jira Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Jira Update User Activity**.

      Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

      In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

      Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

      You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

   c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Jira Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   A draft integration profile is created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The **Connection & Credential** field appears and is automatically set to **sn_jira_spoke.jira_subscription_activity_reclaim**.

Note: The automatically populated value in the **Connection & credential** field changes based on the selection in the **Download activity** and **Reclaim subscriptions** check boxes.

Automatically populated Connection & credential values based on the selection

Selection	Connection & credential value
Both **Download activity** and **Reclaim subscriptions** are selected.	sn_jira_spoke.jira_subscription_activity_reclaim
Only **Download activity** is selected.	sn_jira_spoke.jira_subscription_activity
Only **Reclaim subscriptions** is selected.	sn_jira_spoke.jira_subscription_reclaim
Both **Download activity** and **Reclaim subscriptions** aren't selected.	sn_jira_spoke.jira_subscription

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Name	Name of the connection.
Connection URL	Base URL for the Jira API. This field is automatically set to `https://api.atlassian.com/ex/jira/<Cloud-ID>`.

8. Select **Create and Get OAuth Token**.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

9. When the dialog box appears, grant permission to the Jira application.
The dialog box closes and you automatically return to the Connection & Credential Aliases form.
10. On your ServiceNow instance, specify the groups that have access to Jira products.
By specifying these groups on your ServiceNow instance, you can retrieve data and manage licenses for only the users within these groups.

   a. In a new tab, open the Atlassian Administration portal.

   b. Log in to your site admin account.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select the **Select** button against the required organization.

d. On the side navigation pane, select **Apps** > **Atlassian apps**.

e. On the Atlassian apps page, select **Manage app** on the Jira product row.

f. View the list of groups that have access to Jira Software.
Secure this information for later use.

g. Return to your ServiceNow instance and navigate to **Jira** > **Jira Groups**.

h. On the Jira Groups form, select the **Add Groups** related link.
The Add Jira Groups dialog box opens.

i. Select the Connection & Credential that was set on the integration profile.

j. In the Available list, select the groups that have access to Jira products.

Tip: The Available list includes all groups that are associated with your Atlassian account. Select only the groups that have access to Jira products.

k. Select the right arrow button to move the groups from the Available list to the Selected list.

l. Select **OK**.

11. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

12. After the connection is verified, select **Publish**.
13. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple Jira integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Looker

Integrating your Software Asset Management application with Looker, a Google Cloud application that enables you to track your software subscriptions and to reclaim unused licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Box application	Authentication scopes
Download subscriptions	User with see_users permission	None
Pull user activity	User with see_users permission	None
Reclaim subscription	admin	None

Configure Looker API key settings

Configure API key settings to manage and retrieve Looker API keys.

Before you begin

Looker Role required: admin

Procedure

1. Log in to your Looker (`https://<instancename>.looker.com/`) instance.
2. Select the gear icon to open Admin settings.
3. Select **Users** > **Open the admin user account**.
4. Select **Edit API3 Keys** under the Profile tab.
5. Select **New API3 Key**.
6. Copy the Client ID and Client secret for later use.

Create a Looker integration profile

Create a Looker integration profile to track software subscriptions and optimize licensing for your Looker solutions.

Before you begin

The Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) must be installed from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Looker Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Looker integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Looker Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Looker** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration profile form

Field	Value
Display name	Name of the integration profile. For example, Looker integration.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to #**Draft**. ○ If you have already published the integration profile, this field is automatically set to#**Published**.
Profile type	Type of integration profile. This field is automatically set to Looker Subscription.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Looker Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Looker Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
A draft integration profile is created.

   The **Connection & Credential** field appears and is automatically set to **sn_looker_spoke.Looker**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Information	
Connection Name	Name of the Looker connection. This field populates automatically.
Connection URL	Looker base URL for the API. This field is automatically set to `https://<instance_name>.looker.com`.
Credential Information	
OAuth Client ID	Client ID that is assigned to your Looker application.
OAuth Client Secret	Client secret that is assigned to your Looker application.
OAuth Redirect URL	`https://<instance name>/oauth_redirect.do`, where instance name is the name of your ServiceNow instance.

8. Select **Create and Get OAuth Token**.

> **Note:** For the role required to perform this step, refer to the Minimal user permissions table.

   The dialog box closes and you automatically return to the integration profile form.
9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

10. After the connection is verified, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integrating with Microsoft Dynamics 365 and Power Apps

Integrating your ServiceNow instance with the Microsoft Dynamics 365 and Power Apps service enables you to track your software subscriptions and to reclaim unused licenses.

Important:

This integration retrieves user subscription details for all Microsoft Dynamics 365 and Power Apps products. Furthermore, Software Asset Management provides license compliance for the products using user subscription-based models.

For optimization, Software Asset Management automatically tracks the last activity date and identifies low-usage for the following applications:

- Dynamics 365 for Sales (Professional, Premium, Enterprise)
- Dynamics 365 for Customer Service (Professional, Enterprise, Enterprise for Government, Professional Attach to Qualifying Dynamics, Sales and Customer Service Enterprise)
- Dynamics 365 for Team Members
- Microsoft Relationship Sales (MRS)

For more information about the Microsoft 365 service, see Microsoft 365 frequently asked questions.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in Microsoft Dynamics 365 and Power Apps for Delegated permissions	Authentication scopes for Delegated permissions	Required user role in Microsoft Dynamics 365 and Power Apps for Application permissions	Authentication scopes for Application permissions
Download subscriptions	Global Reader	• LicenseAssignment.Read.All • User.Read.All	Application developer	• LicenseAssignment.Read.All • User.Read.All
Pull user activity	Dynamics 365 administrator, or a custom security role For details, see Create a custom security role for the Microsoft Dynamics 365 integration.	user_impersonation	Not supported by Microsoft	Not supported by Microsoft

Set up Microsoft Azure Active Directory

Set up Microsoft Azure Active Directory (AD).

Before you begin

Role required: Global administrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Log in to the Microsoft Azure portal using an admin account and navigate to **Azure Active Directory**.
2. Navigate to the App registrations section and select **App registration** under **+ Add**.
3. On the Register an application form, fill in the fields.

Register an application form fields

Field	Description
Name	Name of the application that you want to register.
Supported account types	The account with the required organizational directory.
Redirect URI	URL that accesses Azure. Typically the URL of the ServiceNow instance. **Important:** You must select **Web** in the **Select a platform** drop-down list because Azure AD app must be a web application in App registration for this setup.

4. Select **Register**.
5. Open the application that you registered and navigate to the **Overview** section.
6. Collect the Application (client) ID and Directory (tenant) ID.
7. Navigate to the Certificates and Secrets section.
8. Create a client secret by selecting **New client secret** and collect the client secret key. You need the client secret key while configuring your ServiceNow instance.
9. Under API Permission, select **Add a permission** and then select **APIs my organization uses**.
10. Select **Microsoft Graph** and add the required scopes for **Delegated permissions** or **Application permissions**.
    - `Organization.Read.All`
    - `User.Read.All`
    - `Offline_access`
11. Select **Dynamics CRM** and add the following scope.
    `user_impersonation`

    Note: User_impersonation scope is offered only as a Delegated permission in Microsoft Dynamics CRM.

12. Grant admin consent for your application by selecting **Grant admin consent**.
13. In the Authentication section, under the Redirect URI, enter the redirect URI of the ServiceNow instance.

Set up Microsoft Dynamics 365 and Power Apps

Set the system-level settings for Microsoft Dynamics 365 and Power Apps.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: admin

Procedure

1. Go to https://admin.powerplatform.microsoft.com/ .
2. Under Environments, select the environment for which you want to pull the dynamics activities.
3. From the top ribbon, select **Settings**.
4. Select **Audit and logs**.
5. Select the following check boxes.
   - Start Auditing
   - Log access
   - Read logs
6. Select **Additional Audit Settings**.
7. From the **Settings** list, select **Auditing**.
8. Select **Global Audit Settings**.
9. Select the following check boxes.
   - Start Auditing
   - Audit user access
   - Start Read Audit
   - Common Entities
   - Sales Entities
   - Customer Service Entities
10. Select **OK**.

Create a custom security role for the Microsoft Dynamics 365 integration

Create a custom role in the Power Platform admin center that grants only the privileges required by the Microsoft Dynamics 365 and Power Apps integration. You can use this custom role for the minimum permissions instead of using the Dynamics 365 administrator role.

Before you begin
Role required: Global administrator

About this task
The Microsoft Dynamics 365 and Power Apps integration requires read access to user, activity, and metadata tables to pull user activity data. Rather than assigning the Dynamics 365 administrator role, you can create a custom security role with only these privileges.

Procedure

1. Log in to the Power Platform admin center.
2. Under **Environments**, select the environment that you want to integrate with your ServiceNow instance.
3. Select **Settings**.
4. Under **Users + permissions**, select **Security roles**.
5. Select **New role**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Enter a name for the security role.
   For example, SaaSIntegrationDynamics.
7. On the Tables tab, assign the following table privileges.

Table privileges for the custom security role

Table	Name	Record ownership	Read
User	systemuser	Business Unit	Organization
Activity	activitypointer	User or Team	Organization
SharePoint Document	sharepointdocument	User or Team	Organization
Attribute	attribute	None	Organization
Entity	entity	None	Organization
Relationship Entity	relationship	None	Organization

Note: The integration requires read access only, so you set the Create, Write, and Delete privileges to None for all tables.

8. On the Miscellaneous privileges tab, assign the View Audit Summary privilege (prvReadAuditSummary) at the Organization level.

What to do next
Assign the custom security role to the user account with which the Microsoft Dynamics 365 and Power Apps integration authenticates.

Set up ServiceNow instance for Microsoft Dynamics 365 and Power Apps

Set up ServiceNow instance for Microsoft Dynamics 365 and Power Apps to track your software subscriptions and to reclaim unused licenses.

Before you begin
Role required: sam_integrator

Important: You must select the **Microsoft Dynamics 365 Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task
If you're using Software Asset Workspace, the option to create the Microsoft Dynamics 365 and Power Apps integration profile in Core UI is inactive.

Procedure
1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Microsoft Dynamics 365 and Power Apps Integration Profile**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Microsoft Dynamics 365 and Power Apps** from the drop-down list. **d.** Select **Continue**.

2. In the **Display name** field, enter a name of your choice.
3. Under the **Calculate Activity Subflow** tab in the **Analyze user activity from** field, select the date since when you want to pull the activity.
4. Select **Save**.
   A draft integration profile is created. In the **Download Subscription Subflow** tab, the **Connection & Credential** field appears and is automatically set to **sn_ms_365_spoke.Microsoft_365_Graph**. In the **Calculate Activity Subflow** tab, the **Connection & Credential** field appears and is automatically set to **sn_ms_365_spoke.Microsoft_365_Dynamics**.
5. Under the **Download Subscription Subflow** tab, beside the **Connection & Credential** field, select the preview icon ⓘ and then select **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential form

Field	Description
Connection name	A meaningful name for the connection.
Connection URL	The URL of your Microsoft Dynamics 365 environment. For example, `https://graph.microsoft.com`.
Permission type	The type of permission for the integration profile to access data correctly and securely. Values include: ○ **Application Permissions**: Enable the application to access any data without a signed-in user. ○ **Delegated Permissions**: Enable the application to act in place of a signed-in user.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If you have selected Delegated permissions while setting up Microsoft Entra ID, you must select **Delegated Permissions** as the permission type. Similarly, if you have selected Application permissions while setting up Microsoft Entra ID, you must select **Application Permissions** as the permission type.
Tenant ID	The Directory (tenant) ID that you copied in Set up Microsoft Azure Active Directory.
OAuth Client ID	Application (client) ID for the application you created in the Azure portal.
OAuth Client Secret	Client secret for the application you created in the Azure portal.
OAuth Redirect URL	`https://<instance-name>.service-now.com/oauth_redirect.do`, where `<instance-name>` is the name of your ServiceNow instance. This field is visible when you select **Delegated Permissions** as the permission type. This value is automatically populated.

8. Select **Create and Get OAuth Token**.

Important: For the role required to perform this step, refer to the Minimal user permissions table.

9. If you're prompted to log in to your Microsoft 365 account, enter your Microsoft 365 credentials and log in to your account.
10. Under the **Calculate Activity Subflow** tab, beside the **Connection & Credential** field, select the Preview icon.
11. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
12. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential fields

Field	Description
Connection name	A meaningful name for the connection.
Connection URL	The URL of your Microsoft Dynamics 365 environment. For example, `https://myorg.crm.dynamics.com`.
OAuth Client ID	Application (client) ID for the application you created in the Azure portal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
OAuth Client Secret	Client secret for the application you created in the Azure portal.
OAuth Redirect URL	`https://<instance-name>.service-now.com/oauth_redirect.do`, where `<instance-name>` is the name of your ServiceNow instance.

13. Select **Create and Get OAuth Token**.

> **Important:** For the role required to perform this step, refer to the Minimal user permissions table.

14. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

15. After the connection is verified, select **Publish**.
16. In the Publish Confirmation dialog box, select **OK**.

> **Note:** If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:
>
> - The **Status** field on the integration profile form changes to **Draft**.
> - The **Validate connection** button shows up on the form.
> - The current *`SAM - Refresh <displayname> Activity`* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Optimizing Microsoft Dynamics 365 subscriptions

Evaluating the software usage activity of Microsoft Dynamics 365 subscriptions helps you monitor license usage, optimize license allocation, and potentially reduce costs for the assigned licenses. Software usage activity refers to how software products are being used.

Based on the software usage activity and the incurred cost, Software Asset Management generates optimization recommendations for your software subscriptions that include the following:

- **Low usage subscriptions**

  Software Asset Management recommends reclaiming the low usage subscriptions. For example, if the last activity date is 60 days prior to the current date, the subscription is considered a low usage subscription.

- **Consolidated subscriptions**

  If a user has multiple base licenses for different Microsoft Dynamics 365 applications, Software Asset Management recommends consolidating the subscriptions to optimize licensing. This approach involves purchasing one base license and obtaining the rest as attached licenses, ensuring compliance with Microsoft's licensing terms while being more cost-effective.

  For example, if Dynamics 365 Commerce, Dynamics 365 Finance, and Dynamics 365 Human Resources base license subscriptions are purchased for a user, Software Asset Management recommends using Dynamics 365 Commerce as base license and Dynamics 365 Finance and Dynamics 365 Human Resources as attached licenses to the base license. For more information, you can download the Dynamics 365 Licensing Guide from the Dynamics 365 pricing overview page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After completing the Integrating with Microsoft Dynamics 365 and Power Apps integration, you can view the usage activity information in the Software Subscription [samp_sw_subscription] table.

Related topics

Reclamation rules for SaaS and SSO applications

Integrating with Miro Enterprise

Integrating your Software Asset Management application with the Miro Enterprise application enables you to track your software subscriptions and to reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Miro Enterprise application	Authentication scopes
Download subscriptions	Company admin	organizations:read
Pull user activity	Company admin	organizations:read
Reclaim subscription	Company admin	None

Create a Miro Enterprise OAuth 2.0 application

Create a Miro Enterprise OAuth 2.0 application to enable access to the Miro API.

Before you begin

Miro Role required: Refer to the Minimal user permissions table.

Procedure

1. From a web browser, open the Miro Platform.
2. If you have not created any teams within your organization or you want to build and test the OAuth 2.0 application using fake data, get a developer team.
3. Sign in using your Company Admin credentials.
4. On the page header of the Miro Platform, select the organization profile icon.
5. On the side navigation panel, select **Your Apps**.
6. Select **Create a new app**.
7. In the Create new app dialog box, enter a name for the OAuth 2.0 application in the **App Name** field.
8. Select the developer team for which you want to build the OAuth 2.0 application.
9. Select **Create app**.
   The profile settings for your newly created app open.
10. In the App Credentials section, copy the values in the **Client ID** and **Client secret** fields and save them in a secure location for later use.
11. In the Redirect URI for OAuth 2.0 section, enter the URL of the OAuth provider that users are redirected to after authentication and then select **Add**.
    For example, `https://instance.service-now.com/oauth_redirect.do`, where <*instance*> is the name of your ServiceNow instance.
12. In the Permissions section, select the **organizations:read** OAuth scope.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

OAuth scopes specify the level of access that the application has to your protected resources. The organizations:read OAuth scope enables your application to read information about your organization and organization members.

13. Select **Install app and get OAuth token**.

What to do next

Keep your organization profile open so that you can enable SCIM (System for Cross-domain Identity Management) on your Miro Enterprise account. For more information, see Enable SCIM on your Miro Enterprise account.

Enable SCIM on your Miro Enterprise account

Enable SCIM (System for Cross-domain Identity Management) on your Miro Enterprise account so that you can generate an API access token for authenticating your Miro API requests.

Before you begin

Miro Role required: Refer to the Minimal user permissions table.

Procedure

1. On the side navigation panel of your Miro organization profile, select **Apps and integrations** and then select **Enterprise integrations**.
2. On the Enterprise integrations page, select the option to enable **SCIM Provisioning**. The Miro account automatically generates and displays your API access token in the **API Token** field.
3. **Optional:** Select the **Send an email invite to join Miro to provisioned users** check box to enable Miro to send email notifications to all users that have been provisioned using SCIM.
4. Copy the API access token in the **API Token** field and secure it for later use.

Create a Miro Enterprise integration profile

Create a Miro Enterprise integration profile to track software subscriptions and optimize licensing for your Miro Enterprise applications.

Before you begin

To create a Miro Enterprise integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Miro Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Miro Enterprise integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Miro Enterprise Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Miro Enterprise** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the following fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `Miro Enterprise Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **Miro Enterprise Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

> **Note:** For more information about the required roles and scopes, see Minimal user permissions table.

4. Select **Save**.
A draft integration profile is created.
5. In the Download Subscription Subflow section, verify that the **Connection & credential** field is set to **sn_miro_spoke.Miro_Enterprise** and the Subflow field is set to **Miro Download Subscriptions**.

> **Note:** The **Download subscriptions** check box is selected by default and you can't clear it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Open the connection & credential aliases record by selecting the preview icon ⓘ next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.

b. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.

c. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection dialog box

Field	Description
Connection Information	
Connection Name	Name of the Miro Enterprise connection. This field populates automatically.
Credential Information	
OAuth Client ID	Client ID that is assigned to your Miro Enterprise OAuth 2.0 application.
OAuth Client Secret	Client secret that is assigned to your Miro Enterprise OAuth 2.0 application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This field populates automatically based on the redirect URL that you specified in Create a Miro Enterprise OAuth 2.0 application.

d. Select **Create and Get OAuth Token**.

> **Important:** This step must be executed by a ServiceNow admin with the Company Admin role in Miro.

e. On the Miro OAuth authorization dialog box, locate the team that you built the Miro Enterprise OAuth 2.0 application for and then select **Install**.

> **Note:** If another ServiceNow instance is using the same credentials, you would be prompted for a reinstall.

The OAuth access token becomes available for authorizing your Miro Enterprise connection.

6. In the Reclaim Subscription Subflow section, verify that the **Connection & credential** field is set to **sn_miro_spoke.Miro_Enterprise_SCIM** and the **Subflow** field is set to **Miro Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Open the connection & credential aliases record by selecting the preview icon (ⓘ) next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.

b. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.

c. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Information	
Connection Name	Name of the Miro Enterprise SCIM connection. This field populates automatically.
Credential Information	
API Token	API access token for authenticating Miro API requests. Enter the same API access token that you generated and copied in Enable SCIM on your Miro Enterprise account.

d. Select **Create**.
The dialog box closes and you automatically return to the integration profile form.

7. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.

8. After the connection is validated, select **Publish**.
9. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with monday.com

Integrating your Software Asset Management application with monday.com enables you to track your software subscriptions and to reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the monday.com application	Authentication scopes
Download subscriptions	Member	users:read
Pull user activity	Member	users:read

Create a monday OAuth2 application

Create a monday OAuth2 application to authorize access to the monday.com API.

Before you begin

monday.com Role required: Refer to the Minimal user permissions table.

About this task

A monday application enables you to build workflows, user experiences, and products on top of the existing monday.com work operating system (Work OS). When you configure a monday

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

application to use OAuth2, access is granted to the monday.com API so that it can read and modify user data.

Procedure

1. From a web browser, go to monday.com.
2. Log in using your admin credentials.
3. Select your profile icon and then select **Developers**.
   The My Apps page opens.
4. Select **Create App**.
   The Basic Information page for the new application opens.
5. In the Display Information section, fill in the fields.

Display Information

Field	Description
Name	Name of the monday application.
Short Description	Description of the application.

6. **Optional:** In the same section, add your own application icon by selecting the auto-generated icon and then selecting an icon image.
   You can also change the icon color by selecting **App Color** and then selecting either a preset or custom color. If you don't add your own application icon or select an icon color, the application uses the auto-generated icon and default icon color.
7. In the App Credentials section, copy the values in the **Client ID** and **Client Secret** fields. Save them in a secure location for later use.
8. Select **Save App**.
9. From the left navigation menu of the new application, navigate to **General** > **OAuth**.
   The **Scopes** tab of the OAuth & Permissions page opens.
10. In the Scopes section, specify how the application can access or use different types of user data by selecting the check box for the **users:read** OAuth scope.
11. Select **Save Feature**.
12. Select the **Redirect URLs** tab of the OAuth & Permissions page.
13. In the Redirect URLs section, enter the URL of the OAuth provider that users are redirected to after authentication.
    Enter `https://instance.service-now.com/oauth_redirect.do`, where <*instance*> is the name of your ServiceNow instance.
14. Select **Save Feature**.

Create a monday.com integration profile

Create a monday.com integration profile to track software subscriptions and optimize licensing for your monday applications.

Before you begin

To create a monday.com integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You must select the **monday.com Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the monday.com integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **monday.com Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **monday.com** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `monday.com Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **monday.com Subscription**.

3. View the required user roles or API permissions to minimize security risks and optimize SaaS licenses.
   For more information about the required roles and scopes, see Minimal user permissions table.
4. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **monday.com Download Subscriptions**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

5. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_monday_com_spok.Monday**.

6. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
7. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
8. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Name	Name of the connection.
Connection URL	Base URL for the monday.com API. This field is automatically set to `https://api.monday.com/`.
OAuth Client ID	Client ID that is assigned to your monday application.
OAuth Client Secret	Client secret that is assigned to your monday application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This field populates automatically based on the redirect URL that you specified in Create a monday OAuth2 application.

9. Select **Create and Get OAuth Token**.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

10. In the Authorize App dialog box, sign in using the same monday.com credentials that you used to create your monday application.
11. Select **Allow**.
    The dialog box closes and then you automatically return to the integration profile form.
12. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
13. After the connection is verified, select **Publish**.
14. In the Publish Confirmation dialog box, select **OK**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with PagerDuty

Integrating your Software Asset Management application with the PagerDuty application enables you to track your software subscriptions and to reclaim unused licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the PagerDuty application	Authentication scopes
Download subscriptions	• Create OAuth app: Manager • Token generation: Observer	• Scoped OAuth: users:read • Classic User OAuth: Read
Pull user activity	• Create OAuth app: Manager • Token generation: Observer	• Scoped OAuth: oncalls:read • Classic User OAuth: Read
Reclaim subscription	Create OAuth app and token generation: Global admin	• Scoped OAuth: users:write • Classic User OAuth: Read/ Write

Create a PagerDuty application

Create a PagerDuty application to integrate with your ServiceNow instance.

Before you begin

- Activate the PagerDuty spoke. For more information, see PagerDuty Spoke.
- PagerDuty Role required: Refer to the Minimal user permissions table.

Procedure

1. From a web browser, log in to the PagerDuty portal using your account credentials.
2. Log in to your PagerDuty account.
3. Enable Developer Mode.
   - If you're logged in with a developer account, you can access Developer Mode automatically.
   - If you're logged in with a customer account, you must enable Developer Mode manually by following these steps.

   a. Select the INTEGRATIONS tab.

   b. In the DEVELOPER TOOLS section, navigate to **App Registration**.
   You're redirected to the Add New App page in Developer Mode.
4. On the Add New App page, select **New App**.
5. On the App Information form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

App Information form

Field	Description
Name	Name of the PagerDuty application. For example, `ServiceNow Integration`.
Description	Brief description of the application.

6. Select **OAuth 2.0** in the Functionality section.
7. Select **Next**.
   PagerDuty registers your application and then returns you to the Add New App page.

Configure OAuth 2.0 for your PagerDuty application

After you create a PagerDuty application, configure OAuth 2.0 to authorize your application to administer PagerDuty and access user-specific data on user login.

Before you begin

PagerDuty Role required: Refer to the Minimal user permissions table.

Procedure

1. On the Add New App page of your PagerDuty account, select **Scoped OAuth** or **Classic User OAuth** in the Authorization section.
   For more information about the permission scopes, refer to the Minimal user permissions table.
2. In the **Redirect URL** field, enter the URL of the OAuth provider that users are redirected to after authentication.
   For example, `https://<instance-name>/oauth_redirect.do`, where `<instance-name>` is the name of your ServiceNow instance.
3. In the **Permission Scope** field, select the required permission.
4. Select **Register App**.
5. From the OAuth 2.0 Client Information window, copy the values in the **Client ID** and **Client Secret** fields.
   Save them in a secure location for later use.
6. Select **Continue**.

Create a PagerDuty integration profile

Create a PagerDuty integration profile to track software subscriptions and optimize licensing for your PagerDuty applications.

Before you begin

To create a PagerDuty integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **PagerDuty Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

If you're using Software Asset Workspace, the option to create the PagerDuty integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **PagerDuty Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **PagerDuty** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `PagerDuty Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to `Draft`. ○ If you have already published the integration profile, this field is automatically set to `Published`.
Profile Type	Type of integration profile. This field is automatically set to *`PagerDuty`* `Subscription`.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **PagerDuty Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **PagerDuty Update User Activity**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **PagerDuty Reclaim Subscription**.

Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_pagerduty_spoke.PagerDuty**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Name	Name of the connection. For example, `PagerDuty Connection`.
OAuth Client ID	Client ID that is assigned to your PagerDuty application.
OAuth Client Secret	Client secret that is assigned to your PagerDuty application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. Enter `https://<instance-name>/oauth_redirect.do`, where *<instance-name>* is the name of your ServiceNow instance.

8. Select **Create and Get OAuth Token**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

You're redirected to the PagerDuty Accounts page.

9. Select the same PagerDuty account that you used to create your PagerDuty application.
10. When you're prompted to Authorize <*pagerduty - app - name*> to use your account, select **Submit Consent**.
    Your ServiceNow instance creates an OAuth token for PagerDuty and then automatically returns you to the Integration Profile form.
11. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

12. After the connection is verified, select **Publish**.
13. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Rally

Integrating your Software Asset Management application with the Broadcom Rally application enables you to track your software subscriptions and to reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Rally application	Authentication scopes
Download subscriptions	Workspace admin	None
Pull user activity	Workspace admin	None
Reclaim subscription	Workspace admin	None

Register a Rally OAuth application

Register the Rally OAuth application to access the Rally API 2.0 and to receive a Client ID and Client secret.

Before you begin

The Rally Integration Hub spoke must be active. For more information, see Rally spoke.

Rally Role required: Refer to the Minimal user permissions table.

Procedure

1. Log in to CA Agile Central by using your admin credentials.
2. On the page header, select your profile and then select **My Settings**.
3. Navigate to **Access** > **OAUTH CLIENTS**.
4. Select **Create**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. In the dialog box, fill in the fields.

Create Oauth Client dialog box

Field	Value
Application Name	Provide a name for the application.
Callback URL	Callback URL of the ServiceNow instance to which the application is to be integrated. For example, `https://<instance_url>/oauth_redirect.do`.

6. Select **Next**.
7. Copy the Client ID and Client secret for later use.

Create a Rally integration profile

Create a Rally integration profile to track software subscriptions and optimize licensing for your Rally solutions.

Before you begin

The Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) must be installed from the ServiceNow Store.

Role required: sam_integrator

Important: You must select the **Rally Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Rally integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Rally Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Rally** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration profile form

Field	Value
Display name	Name of the integration profile. For example, Rally integration.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to #**Draft**. ○ If you have already published the integration profile, this field is automatically set to#**Published**.
Profile type	Type of integration profile. This field is automatically set to Rally Subscription.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Rally Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Rally Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   A draft integration profile is created.

   The **Connection & Credential** field appears and is automatically set to **sn_rally_spoke.Rally**.

5. Open the connection & credential aliases record by selecting the preview icon ⓘ next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential

Field	Value
Connection Information	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Connection Name	Name of the Rally connection. This field populates automatically.
Connection URL	URL for the connection. This field is automatically set to `https://rally1.rallydev.com/slm/webservice`.
Credential Information	
OAuth Client ID	Client ID that you generated while configuring Rally API settings.
OAuth Client Secret	Client Secret that you generated while configuring Rally API settings.
OAuth Redirect URL	`https://<instance_name>/oauth_redirect.do`, where instance name is the name of your ServiceNow instance.

8. Select **Create and Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

   The dialog box closes and you automatically return to the integration profile form.
9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.
10. After the connection is verified, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Roadmunk

Integrating your Software Asset Management application with the Roadmunk application enables you to track your software subscriptions and to reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Roadmunk application	Authentication scopes
Download subscriptions	Account Admin	No scopes
Pull user activity	Account Admin	No scopes
Reclaim subscription	Account Admin	No scopes

Generate a Roadmunk API access token

Generate an API access token that authorizes access to the Roadmunk GraphQL API.

Before you begin

Roadmunk Role required: Account Admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From a web browser, open Roadmunk.
2. Log in using your account admin credentials.
3. On the left navigation menu of the Roadmunk dashboard, select your profile icon and then select **Account Settings**.
4. On the page header of your account settings, select the **Integrations** tab.
5. Under Existing Integrations, select **Add an integration**.
6. When prompted to select an integration to configure, select **API Tokens**.
7. On the Roadmunk API Tokens form, enter a name for your API access token in the **Application Name** field.
8. Select **Create API Token**.
   The API access token is generated and then the API Token Created dialog box opens.
9. On the API Token Created dialog box, copy your API access token by selecting **Copy To Clipboard**.
   Save it in a secure location for later use.

Create a Roadmunk integration profile

Create a Roadmunk integration profile to track software subscriptions and optimize licensing for your Roadmunk applications.

Before you begin

To create a Roadmunk integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Roadmunk Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Roadmunk integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Roadmunk Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
	c. Select **Roadmunk** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `Roadmunk Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **Roadmunk Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Roadmunk Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Roadmunk Update User Activity**.

Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *`SAM - Refresh <displayname> Activity`* isn't created.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Roadmunk Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.

   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_roadmunk_spoke.Roadmunk**.

5. **Optional:** To avoid your integration profile from including inactive users in your list of Roadmunk subscriptions, enable the Roadmunk Download Subscriptions subflow to download only the active users in your Roadmunk account.
   By default, the Roadmunk Download Subscriptions subflow downloads all users in your Roadmunk account, including both active and inactive users.

   a. In a new tab or window, open Roadmunk.

   b. Log in using your Account Admin credentials.
   The Roadmunk dashboard opens.

   c. On the left navigation menu of the Roadmunk dashboard, select your profile icon and then select **Account Settings**.
   Your account settings open.

   d. On the page header of your account settings, select the **Reports** tab.

   e. From the list of available Roadmunk reports, select **Download User CSV**.
   The Roadmunk User Report downloads in `.csv` format.

   f. Return to the Integration Profile form.

   g. On the form header, select the **Manage Attachments** icon.

   h. In the Attachments dialog box, select **Choose file** to locate and select the Roadmunk User Report that you downloaded in step e.

   i. After the report uploads successfully, close the dialog box to return to the Integration Profile form.

   > **Tip:** For continuously removing inactive users from your list of Roadmunk subscriptions, download and attach the latest version of the Roadmunk User Report periodically.

6. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
7. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection dialog box

Field	Description
Connection Information	
Connection Name	Name of the Roadmunk connection. This field populates automatically.
Connection URL	URL for the connection. This field is automatically set to **https://app-gateway.roadmunk.com**, where **app** is the default geographic region (North America) in which the connection is being created. If you're creating the connection outside of the default **app** (North America) region, you can change the value of the region to either **eu** (Europe) or **apac** (Asia-Pacific Region).
Credential Information	
API Token	API access token that authorizes access to the Roadmunk GraphQL API. Enter the same API access token that you generated in Generate a Roadmunk API access token.

9. Select **Create**.
10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.
11. After the connection is verified, select **Publish**.
12. Select **Publish**.
13. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Salesforce CRM

Integrating your Software Asset Management application with the Salesforce customer relationship management (CRM) services enable you to track your software subscriptions and to reclaim unused licenses.

Note:

If you're using Software Asset Workspace, use SaaS Playbook for integrating your ServiceNow instance with the Salesforce CRM. For more information about creating a Salesforce CRM integration profile through Playbook, see Create a Salesforce CRM integration.

The supported Salesforce CRM services include

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Salesforce Sales Cloud
- Salesforce Service Cloud
- Salesforce Platform
- Salesforce Customer Community
- Salesforce Partner Community
- Salesforce Company Community
- Salesforce Chatter

Both Salesforce Classic and Salesforce Lightning organizations are supported.

Note: You can track entitlements for other services that you pay for but aren't user subscription based by using custom license metrics. See Add a custom license metric for more details on how to create a custom license metric.

The Salesforce account that you use to connect the integration requires a Salesforce user license and the following user access permissions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Salesforce CRM application	Authentication scopes
Download subscriptions	User with the following permissions: • View Setup and Configuration • API Enabled	Application with grant type **Authorization code**: • manage your data (api) • Perform requests on your behalf at any time (refresh_token, offline access) Application with grant type **Client Credentials**: manage your data (api)
Pull user activity	User with the following permissions: • View Setup and Configuration • API Enabled	Application with grant type **Authorization code**: • manage your data (api) • Perform requests on your behalf at any time (refresh_token, offline access) Application with grant type **Client Credentials**: manage your data (api)
Reclaim subscription	User with Admin permissions	Application with grant type **Authorization code**: • manage your data (api) • Perform requests on your behalf at any time (refresh_token, offline access) Application with grant type **Client Credentials**: manage your data (api)
Download consumption	User with the following permissions: • View Setup and Configuration • API Enabled	Application with grant type **Authorization code**: • manage your data (api) • Perform requests on your behalf at any time (refresh_token, offline access) Application with grant type

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

These are optional permissions that may be required when minimum permissions are restricted due to your organization's security policies.

User access permissions

Permission	Enabled	Description
View Developer Name	Yes	Allows you to view the DeveloperName field via the API. Salesforce APIs.
Manage Internal Users	Yes	Allows you to create and modify internal users. Allows you to view Setup pages.
Manage Users	Yes	Allows you to create, edit, and deactivate users. Additionally, you can manage security settings, including profiles and roles.
View All Profiles	Yes	Allows you to view all user profiles regardless of the profile filter settings.
View All Users	Yes	Allows you to view all users regardless of the sharing settings.

For additional information on the Salesforce CRM services, see the Salesforce Developer Documentation.

The **Client Credentials** grant type is supported in Software Asset Management - SaaS License Management (sn_sam_saas_int) 16.1.0, Salesforce CRM application 2.0.2, and Salesforce CRM Spoke 2.4.0 version onwards.

Register a Salesforce application

Register an application through the Salesforce admin portal.

Before you begin

Salesforce Role required: admin

Procedure

1. Log in to Salesforce.
   You can also switch from the Lightning UI.
2. Select the setup icon and then select **Setup**.
3. Search for and select **App Manager** in the setup page search bar.
4. On the App Manager page, select **New External Client App** to create an external client application.
5. On the form, fill in the fields.

New Connection App form

Field	Description
Basic Information	
External Client App Name	Name of your application.
API Name	Name of the API. This field is automatically populated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Contact Email	The email address that you want to associate with the application.
Distribution State	The scope of distribution of the application. Select **Local** as the distribution state.
Contact Phone	The phone number that you want to associate with the application.
Info URL	The URL of the web page with more information about your application.
Logo URL	The URL of your logo image that is displayed with the connected application.
Icon URL	The URL of the icon for the connected application.
Description	Description of the application.
API (Enable OAuth Settings)	
Enable OAuth	Option to enable OAuth settings. Select this option to enable the OAuth settings.
Callback URL	URL of the OAuth provider that users are redirected to after authentication. Enter `https://instance.service-now.com/oauth_redirect.do`, where <*instance*> is the name of your ServiceNow instance.
OAuth Scopes	OAuth scopes that determine the amount of access that is granted to an access token. When the grant type is **Authorization Code**, use: ○ **Manage user data via APIs (api)** ○ **Perform requests at any time (refresh_token, offline_access)** When the grant type is **Client Credentials**, use **Manage user data via APIs (api)**.
Flow Enablement	
Enable Client Credentials Flow	Select this option when the grant type is **Client Credentials**.
Security	
Require Secret for Web Server Flow	The option to implement the Require Secret for Web Server Flow in your external client app or connected app settings.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ If the grant type is **Authorization Code**, select this option. ○ If the grant type is **Client Credentials**, clear this option.
Require Secret for Refresh Token Flow	The option in your external client app or connected app while implementing the refresh token flow using a server-side callback handler. ○ If the grant type is **Authorization Code**, select this option. ○ If the grant type is **Client Credentials**, clear this option.
Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows	Clear this option.

6. Select **Create**.
   The application registration is complete and you're redirected to the Manage External Client Apps page.
7. Verify and edit the policies for the registered application by selecting **Edit**.
8. In the OAuth Policies section, verify that the **Permitted Users** field is set to **Admin approved users are pre-authorized** for the ServiceNow application.

   Note: Admin-approved users who are preauthorized enable any users with the corresponding profile or permission set to access the application without prior authorization. For more information, see Pre-Authorize User App Access Through Connected App Policies.

9. In the App Policies section, select either the profile of the integration user or the profile of the user that you want to use for the integration.
10. If you have selected the **Enable Client Credentials Flow** option, then in the OAuth Flows and External Client App Enhancements section, select **Enable Client Credentials Flow** and enter either the username or email address of the integration user that you want to use for the integration profile.
11. In the App Authorization section, verify that the **Refresh token policy** field is set to **Refresh token is valid until revoked** and the **IP Relaxation** field is set to **Relax IP restrictions**.
12. Select **Save**.
13. Retrieve OAuth credentials.

    a. Navigate to **Settings** > **OAuth Settings** and then select **Consumer Key and Secret**.
    The Salesforce login page opens in a new window.

    b. Enter your credentials to log in to Salesforce.

    c. Copy the **Consumer Key** and **Consumer Secret** and save them in a secure location for later use.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a Salesforce CRM integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Salesforce CRM services.

Note: You must create Salesforce CRM integration only in the Global scope.

Create your first Salesforce CRM integration profile

Create an integration profile for the first Salesforce organization for which you want to track software subscriptions and optimize licensing.

Before you begin

To create a Salesforce CRM integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Software Asset Management integration with Salesforce CRM** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Salesforce CRM integration profile in Core UI is inactive.

If you're using Software Asset Workspace, use SaaS Playbook for integrating your ServiceNow instance with Salesforce CRM. For more information about creating a Salesforce CRM integration profile through Playbook, see Create a Salesforce CRM integration.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Salesforce CRM Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Salesforce CRM** from the drop-down list. **d.** Select **Continue**. The Playbook launches for Salesforce CRM integration and the next steps aren't valid. For more information, see Create a Salesforce CRM integration.

2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration Profile form

Field	Description
Display name	Name of the integration profile. Enter a name that uniquely identifies the Salesforce organization for which you're creating this integration profile. For example, `SFDC Org1`. **Tip:** Keep this name short to help it displays better during reporting.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This value is automatically set to **Salesforce CRM Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce CRM Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce CRM Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

   c. On the **Download Consumption Subflow** tab, verify that the **Subflow** field is set to **Salesforce CRM Download Consumption**.

4. Select **Save**.

   Note: The Calculate Activity Subflow isn't required for Salesforce CRM integrations because these integrations use information about last user login from the user records.

   Your instance creates a draft integration profile. You can view consumption counts for the specific consumption based Salesforce CRM application.

   The **Connection & Credential** field appears and is automatically set to **sn_sforce_v2_spoke.Salesforce**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field to configure the child alias.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select **Open Record** in the record preview.
7. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
8. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection information	
Connection Name	Name of the connection. Enter a name that uniquely identifies the Salesforce organization for which you're creating this connection and credential. For example, `SFDC Org1`.
Connection URL (Instance URL)	URL that displays after logging in to Salesforce or your custom domain URL of Salesforce.
Credential information	
Grant type	The grant type for your application according to your authentication needs. Possible values are: ○ **Authorization Code** ○ **Client Credentials**
OAuth Client ID	Client ID (consumer key) that is assigned to your Salesforce application.
OAuth Client Secret	Client secret (consumer secret) that is assigned to your Salesforce application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This is generally the URL of the ServiceNow instance that you specified in Register a Salesforce application.

9. Select **Create and Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

10. In the OAuth2 dialog box, log in to the same Salesforce admin account that you used to create your Salesforce application.

    Tip: If the dialog box doesn't open automatically, check to make sure that pop-ups are allowed on your browser.

    If you have selected **Client Credentials** as the grant type, the OAuth2 dialog box doesn't appear.

    Your ServiceNow instance creates an OAuth token for Salesforce.

11. Return to your integration profile by navigating to **SaaS License** > **Administration** > **Direct Integration Profiles** and then selecting the profile from the Integration Profiles list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

12. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.

13. After the connection is verified, select **Publish**.
14. In the Publish Confirmation dialog box, select **OK**.

Result

After you publish the integration profile, your ServiceNow instance begins retrieving data from your Salesforce CRM services. For organizations with fewer than 100 users, this process typically takes only a few minutes to complete. For organizations with 100–5000 users, this process can take around 15 minutes to complete. For organizations with over 5000 users, this process can take over one hour to complete.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Create additional Salesforce CRM integration profiles

Create an integration profile for each additional Salesforce organization that you want to track software subscriptions and optimize licensing for.

Before you begin

To create a Salesforce CRM integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Software Asset Management integration with Salesforce CRM** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Salesforce CRM integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Salesforce CRM Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Salesforce CRM** from the drop-down list. **d.** Select **Continue**. The Playbook launches for Salesforce CRM integration and the next steps aren't valid. For more information, see Create a Salesforce CRM integration.

2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration Profile form

Field	Description
Display name	Name of the integration profile. Enter a name that uniquely identifies the Salesforce organization for which you're creating this integration profile. For example, `SFDC Org2`. **Tip:** Keep this name short to help it display better during reporting.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This value is automatically set to **Salesforce CRM**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce CRM Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce CRM Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

   c. On the **Download Consumption Subflow** tab, verify that the **Subflow** field is set to **Salesforce CRM Download Consumption**.

4. Select **Save**.

   Note: The Calculate Activity subflow isn't required for Salesforce CRM integrations because these integrations use information about last user logins from the user records.

   Your instance creates a draft integration profile. You can view consumption counts for the specific consumption based Salesforce CRM application.

   The **Connection & Credential** field appears and is automatically set to **sn_sforce_v2_spoke.Salesforce**.

5. Select the preview icon ⓘ next to the **Connection & Credential** field to open the connection & credential aliases record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select **Open Record** in the record preview.
7. On the Connection & Credential Aliases form, create a child alias that can uniquely identify the connection and credentials for this integration profile.
   The first Salesforce CRM integration profile that you create uses the default (parent) connection and credential alias for Salesforce. Each additional Salesforce CRM integration profile that you create requires a unique child alias that helps differentiate the connection and credentials between each integration profile.

   a. Select the link under **Child Aliases** > **Parentalias=*** ** to add child aliases.

   b. Select **New**.
   The Connection & Credential Aliases form for the child alias opens.

   c. Enter a name for the child alias in the **Name** field.

   d. Select and hold (or right-click) the form header and then select **Save**.

   e. After the form reloads, select the **Create New Connection & Credential** related link.

   f. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection information	
Connection Name	Name of the connection. Enter a name that uniquely identifies the Salesforce organization for which you're creating this connection and credential. For example, `SFDC Org2`.
Connection URL (Instance URL)	URL of the Salesforce instance that you're connecting to through this integration.
Credential information	
Grant type	The grant type for your application according to your authentication needs. Possible values are: ▪ **Authorization Code** ▪ **Client Credentials**
OAuth Client ID	Client ID (consumer key) that is assigned to your Salesforce application.
OAuth Client Secret	Client secret (consumer secret) that is assigned to your Salesforce application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This is generally the URL of the ServiceNow instance that you specified in Register a Salesforce application.

   g. Select **Create and Get OAuth Token**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

h. In the OAuth2 dialog box, log in to the same Salesforce admin account that you used to register your Salesforce application.

Tip: If the dialog box doesn't open automatically, check to make sure that pop-ups are allowed on your browser.

If you have selected **Client Credentials** as the grant type, the OAuth2 dialog box doesn't appear.

Your ServiceNow instance creates an OAuth token for Salesforce.

8. Return to your integration profile by navigating to **SaaS License** > **Administration** > **Direct Integration Profiles** and then selecting the profile from the Integration Profiles list.
9. In the **Connection & Credential** field of the Integration Profile form, select the lookup icon to locate and select the child alias that you created in step 7.
Selecting the child alias associates the alias with the integration profile. Your ServiceNow instance uses this alias to identify the connection and credentials for this integration profile.
10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.
11. After the connection is verified, select **Publish**.
12. In the Publish Confirmation dialog box, select **OK**.

Result

After you publish the integration profile, your ServiceNow instance begins retrieving data from your Salesforce CRM services. For organizations with fewer than 100 users, this process typically takes only a few minutes to complete. For organizations with 100-5000 users, this process can take around 15 minutes to complete. For organizations with over 5000 users, this process can take over one hour to complete.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Salesforce Marketing Cloud

Integrating your Software Asset Management application with the Salesforce Marketing Cloud service enables you to track your software subscriptions and to reclaim unused licenses.

Use either of the following authentication methods to integrate your ServiceNow instance with Salesforce Marketing Cloud:

- Basic authentication
- OAuth 2.0

Integrate Salesforce Marketing Cloud using basic authentication

Integrate your ServiceNow instance with Salesforce Marketing Cloud by using basic authentication.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Salesforce Marketing Cloud application	Authentication scopes
Download subscriptions	• Email > Admin > API Access > WebService API • Administration > Users > View	None
Pull user activity	• Email > Admin > API Access > WebService API • Administration > Users > View	None
Reclaim subscription	• Email > Admin > API Access > WebService API • Administration > Users > View • Administration > Users > Update	None
Download consumptions	• Email > Admin > API Access > WebService API • Email > Subscribers > Data Extension > View • Email > Subscribers > Data Extension > Manage Data	None

Create a user for accessing the Salesforce Marketing Cloud SOAP API

Create a user with which you can access the Salesforce Marketing Cloud SOAP API. The SOAP API enables you to retrieve records from your Salesforce Marketing Cloud data extensions and get information about your Salesforce Marketing Cloud users.

Before you begin

Salesforce Marketing Cloud Role required: admin user with privileges to create users and roles

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Note:

To use the web services, navigate to **Setup Home** > **Settings** > **Security** > **Security Settings**. In the Username and Logins section, select the **Enable Username and Password for Web Services** check box.

For accessing user licenses and data extension, the API user must be created within the parent business unit. If the API user is created in a child business unit, it might not have access to the parent business unit's data.

Procedure

1. From a web browser, go to your Salesforce Marketing Cloud instance.
2. Log in using your admin credentials.
3. On the page header of your instance, select your profile icon and then select **Setup**.
4. Create a Salesforce Marketing Cloud user.
   a. Navigate to **Administration** > **Users** > **Users**.
   b. Select **Create**.
   c. On the form, fill in the fields.

General Settings form

Field	Description
Name	Name of the user.
Reply Email Address	Email address that you want to send and reply to email messages from. Salesforce Marketing Cloud also sends forgotten password requests to this email address. After you enter an email address, select **Verify** to verify the email address.
Add to From Name Dropdown	Option to send the reply email address through a domain verification process before the email address populates in an email.
Notification Email Address	The email address that you want to send Salesforce Marketing Cloud notifications to.
Username	User name for the user.
External Key	Key that uniquely identifies the user during API calls.
Time Zone	Time zone in which the user is located.
Culture Code	Language that is used on the Salesforce Marketing Cloud user interface for this user.
API User	The option indicating whether the user can access the Salesforce Marketing Cloud SOAP API. Select the check box to enable this option.
Temporary Password	A temporary password with which you can log in for the first time. You're prompted to change this password on the first login.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Verify Password	Field to verify the temporary password.

d. Select **Save**.

5. Create a user role that enables assigned users to access the Salesforce Marketing Cloud SOAP API and also manage users and data extensions.

a. Navigate to **Administration** > **Users** > **Roles**.

b. Select **Create**.

c. On the form, fill in the fields.

Properties form

Field	Description
Name	Name of the user role.
External Key	Key that uniquely identifies the user role.
Description	Description of the user role.

d. In the Permissions form section, expand the **Email** > **Subscribers** > **Data Extension** permission category and then select the **Allow** check box for the View and Manage Data access permissions.

e. Expand the **Email** > **Admin** > **API Access** permission category and then select the **Allow** check box for the WebService API access permission.

f. Expand the **Administration** > **Users** permission category and then select the **Allow** check box for the following access permissions:

- View
- Update
- Disable

g. Select **Save**.

6. Assign the user role to your Salesforce Marketing Cloud user.

a. Navigate to **Administration** > **Users** > **Users**.

b. From the list of available users, select the check box for the user that you created in step 4.

c. Select **Manage Roles**.
The Roles form for the selected user opens.

d. In the Roles form section, select **Edit Roles**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. When the list of available roles appears, select the check box for the user role that you created in step 5.

f. Select **Save**.

Create a Contacts Counts report in Salesforce Marketing Cloud

Create a Contacts Counts report to retrieve and display the total number of billable contacts in your Salesforce Marketing Cloud account.

Before you begin

Salesforce Marketing Cloud Role required: admin

Procedure

1. From a web browser, go to your Salesforce Marketing Cloud instance.
2. Log in using your admin credentials.
3. On the page header of your instance, select the business unit profile icon and then select the top-level parent business unit so that your Contacts Counts report includes data for both the parent business unit and all corresponding child business units.
4. From the list of available Salesforce Marketing Cloud applications, select the **Analytics Builder** app icon and then select **Reports**.
   The Reports app overview opens.
5. In the Report Catalog section, select **View Catalog**.
6. From the Reports Catalog, search for **Contacts Counts** and then select **Create**.
   The Create Report dialog box opens.
7. In the dialog box, select the time period that you want to retrieve and display data for from the **Date Range** list.
   The default value is **Last 30 Days**.

   Tip: To avoid performance issues during report generation, you should set this value to **Last 7 Days**.

8. Select **Submit**.
   Your Salesforce Marketing Cloud instance generates the report and displays the results on the Results: Contacts Counts page.
9. On the Results: Contacts Counts page, select **Save**.
   The Save Report dialog box opens.
10. In the dialog box, fill in the fields.

Save Report dialog box

Field	Description
Report Name	Name of the report.
Report Source	Source of the report. This field is automatically set to **Contacts Counts**.
Description	Description of the report.

11. Select **Save**.
12. Create a schedule to run the Contacts Counts report automatically.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the page header of the Reports app, select the **Overview** tab to return to the Reports app overview.

b. From your list of reports, open your newly created Contacts Counts report.

c. In the Schedule Options section, select **Edit**.

d. In the dialog box, fill in the fields.

Edit Schedule Options dialog box

Field	Description
Schedule Options	
Start	The date and time from which you want to start running the report.
Time Zone	Time zone in which the report is being scheduled.
Repeat	Frequency at which you want to run the report. Configure the report to run once every week on Sundays.
End	Date on which you want to stop running the report.
Delivery Options	
Format	File type and file extension in which you want to receive the report results. Select **Data File (.csv)**.
Location	Location in which you want to save or share the report. Set this field to **Save report for FTP** and then fill in the corresponding fields: ▪ **Report Name**: The file name of the report, excluding the file extension. If you want to include date and time in the report name, add it in the `Reportname_YYYYMMDD_HHMMSS` format. **Note:** Take note of this file name for later use. ▪ **Unique Option**: Option to create a report record instead of replacing the existing report record in SFTP. Leave this check box unselected. ▪ **FTP Location**: Location of your Salesforce Marketing Cloud FTP files. Select **ExactTarget Enhanced FTP** so that the report is saved to your SFTP (SSH File Transfer Protocol) Reports folder. **Note:** You can set up an SFTP user account in Salesforce Marketing Cloud to view the saved files at a specific FTP location. For more information, see Setting up an SFTP user account in Salesforce Marketing Cloud.

e. Select **Save**.

Create a data extension for your Contacts Counts report

Create a data extension to store your Contacts Counts report data on your Salesforce Marketing Cloud instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Salesforce Marketing Cloud Role required: admin

About this task
Data extensions are tables that contain attributes representing your report data. When your ServiceNow instance connects with the Salesforce Marketing Cloud service, it retrieves data from this data extension.

Procedure
1. On the page header of your Salesforce Marketing Cloud instance, hover the Salesforce icon to display the list of available Salesforce Marketing Cloud applications.
2. Select the **Audience Builder** app icon and then select **Contact Builder**.
   The Contact Builder app opens.
3. Select the **Data Extensions** tab.
4. In the pop-up dialog box, select **Get started** and then select **Create**.
   The Create New Data Extension dialog box opens.
5. In the Properties step, fill in the fields.

Properties fields

Field	Description
Creation Method	Method in which you want to create the data extension. Select **Create from New**.
Name	Name of the data extension.
External Key	Optional key that uniquely identifies the data extension. You can enter a key of your choice.
Description	Description of the data extension.
Type	Type of data extension. This field is automatically set to **Standard**.
Location	Location in which you want to store the data extension. This field is automatically set to **Data Extensions**. Select **Change Location** to select a different location.
Is Sendable?	Option to indicate whether the data extension can be sent to your subscribers.

6. Select **Next**.
7. In the Data Retention Policy step, set the **Retention Setting** field to **Off**.
8. Select **Next**.
9. In the Attributes step, add the attributes that you want to include in the data extension. Attributes are used to map and import data from a report to a data extension. You must create an attribute for each report column that you want to import data from. Each attribute name must exactly match the corresponding report column name.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For the Salesforce Marketing Cloud integration, attributes for the following Contacts Counts report columns are required:

Attributes fields

Field	Description
Primary Key	Option for the attribute to include a unique identifier for all records in the data extension. This option must be enabled for the **Count_Date** attribute.
Name	Name of the attribute. This name must exactly match the corresponding report column name.
Data Type	Data type of the attribute.
Required	Option that indicates whether the attribute requires a value for each record in the data extension.
Length	Maximum number of characters allowed in the attribute value.
Default Value	Optional default value for the attribute. For the **Flag** attribute, set the default value to `1`. **Note:** Don't enter a default value for any attributes that are assigned as a primary key.

Name	Data Type
Count_Date	Text
Total_Distinct_Contacts_Count	Text
Total_Distinct_Email_Addresses1	Text
Total_Distinct_Mobile_Addresses_Count	Text
Flag	Text

Note: You can add additional attributes and the name must be the same as the Integration Attributes. For more information, see Create a Salesforce Marketing Cloud integration profile using basic authentication or Create a Salesforce Marketing Cloud integration profile using OAuth 2.0.

Attributes for all other Contacts Counts report columns are optional. Fill in the fields for each attribute that you want to add.

10. Select **Complete**.
11. In the Data Extension Created dialog box, select **OK**.

Build an automation to import Contacts Counts report data in your data extension

Create an automation to automatically import Contacts Counts report data into your data extension after the report is generated.

Before you begin

Salesforce Marketing Cloud Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. On the page header of your Salesforce Marketing Cloud instance, hover the Salesforce icon to display the list of available Salesforce Marketing Cloud applications.
2. Select the **Journey Builder** app icon and then select **Automation Studio**.
   The Automation Studio app overview opens.
3. Select **New Automation**.
   The workflow for the new automation opens.
4. Create an automation schedule by dragging the **Schedule** icon from the Starting Sources section of the left menu pane to the Starting Source section of the workflow canvas.
5. Define a schedule for the automation.

   a. In the Starting Source section of the workflow canvas, select **Configure**.

   b. In the dialog box, fill in the fields.

Define Schedule dialog box

Field	Description
Start Date	The date from which you want to start running the automation.
Start Time	The time from which you want to start running the automation.
Time Zone	Time zone in which the automation is being scheduled.
Repeat	The frequency at which you want to run the automation. Configure the automation to run after the Contacts Counts report is generated. Select the same frequency that you had selected while creating a Contacts Counts report in Salesforce Marketing Cloud. **Tip:** If you configure the automation to run on the same day that the report is generated, select a start time that gives enough time for the report to finish generating. ServiceNow recommends a start time of at least two hours after the report start time.
End	Number of times that the automation can run until the automation schedule ends. If you don't want the automation schedule to end, set this field to **Never**. This field doesn't appear only when **None (run once)** is selected from **Repeat**.

   c. Select **Done**.

6. Add a script activity to execute the Server-Side JavaScript for all activities that require it.

   a. In the Activities section of the left menu pane, drag the **Script** icon into the workflow canvas.
   The script activity becomes the first step of the automation workflow.

   b. Select **Choose** on the script activity step.
   The Choose Script Activity dialog box opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select **Create New Script Activity**.
The Create New Script Activity dialog box opens.

d. In the Properties step, fill in the fields.

Properties fields

Field	Description
Name	Name of the script activity.
External Key	Optional key that uniquely identifies the script activity. You can enter a key of your choice.
Folder Location	The location in which you want to store your scripts. Select **Choose...** to select a different location. This field is automatically set to **Scripts**.
Description	Description of the script activity.

e. Copy and paste the following Server-Side JavaScript into the Server-Side JavaScript text box:

```
<script runat="server">
var rows =
 Platform.Function.DeleteData('*<data-extension-name>*',['Fla
g'],['1']);
</script>
```

The **<data-extension-name>** must exactly match the file name of the Data Extension that you created in Create a data extension for your Contacts Counts report.

f. Select **Validate Syntax** to verify that the Server-Side JavaScript syntax is valid.

g. Select **Next**.

h. In the Summary step, verify that the script activity configuration is correct and then select **Finish**.

7. Add a data extract activity to copy the Contacts Counts report from the SFTP Reports folder to the SFTP Import folder.
The Salesforce Marketing Cloud instance uses the SFTP Import folder to locate and import report data into your data extensions. To enable your instance to import data from the Contacts Counts report into the corresponding data extension, you must copy the report to the SFTP Import folder.

a. In the Activities section of the left menu pane, drag the **Data Extract** icon into the workflow canvas.
The data extract activity becomes the second step of the automation workflow.

b. Select **Choose** on the data extract activity step.
The Choose Data Extract Activity dialog box opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select **Create New Data Extract Activity**.
The Create New Data Extract Activity dialog box opens.

d. In the Properties step, fill in the fields.

Properties fields

Field	Description
Name	Name of the data extract activity.
External Key	Optional key that uniquely identifies the data extract activity. You can enter a key of your choice.
File Naming Pattern	The file name of the Contacts Counts report that you want to extract data from. This name must exactly match the file name of the Contacts Counts report that you created in Create a Contacts Counts report in Salesforce Marketing Cloud, including the file extension.
Extract Type	Data extract method. Set this field to **Enhanced FTP File Move and Copy**.
Description	Description of the data extract activity.

e. Select **Next**.

f. In the Configuration step, fill in the fields.

Configuration fields

Field	Description
Input Folder	Location in which you've saved the Contacts Counts report. Enter `\reports\`.
Output Folder	Location that you want to copy the report to. Enter `\Import\`.
Copy To Folder	Option to copy instead of move the report from the input folder to the output folder. This option enables you to keep the report in both locations. Select the check box to enable this option.

g. Select **Next**.

h. In the Summary step, verify that the data extract activity configuration is correct and then select **Finish**.

8. Add an import file activity to import the Contacts Counts report data into the data extension.

a. In the Activities section of the left menu pane, drag the **Data Copy or Import** icon into the workflow canvas.
The Data Copy or Import activity becomes the third step of the automation workflow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. Select **Choose** on the Data Copy or Import activity step.
The Choose Data Copy or Import dialog box opens.

c. Select **Create New Copy or Import Definition**.
The Create New Copy or Import Definition dialog box opens.

d. In the Activity Info step, fill in the fields.

Activity Info fields

Field	Description
Name	Name of the import file activity.
Description	Description of the import file activity.
External Key	Optional key that uniquely identifies the import file activity. You can enter a key of your choice.
Send notification email to	The email address to which you want to send notifications when an import completes. If you specify an email address, a notification email that contains the number of inserted and updated rows is sent to that address on successful import. **Important:** The notification email contains an `Invalid Field Count` validation error due to the presence of empty lines in the imported CSV file. These empty lines appear automatically when you save the report to FTP. However, they have no impact on the integration.

e. Select **Next**.

f. In the Source step, select **File Location** in the Data Source header and fill in the fields.

Import File fields

Field	Description
File Location	Location of the Contacts Counts report that you want to import data from. Select **ExactTarget Enhanced FTP**.
File Naming Pattern	The file name of the Contacts Counts report that you want to import data from. If you want to include date and time in the report name, add it in the `Reportname_YYYYMMDD_HHMMSS` format by selecting the **Date variable** and **Time variable** fields. This name must exactly match the file name of the Contacts Counts report that you created in Create a Contacts Counts report in Salesforce Marketing Cloud, including the file extension.
Date Format	Format in which you want to display the date and time of the report data.
Delimiter	Format in which you want to separate each report record. Select **comma** to separate each record with a comma.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	If you want to enable the use of double quotes to separate each record, enable the **Respect double quotes (") as a text delimiter** option.
Bad Data Behavior	Option to skip rows with bad data. Select the check box to enable this option.

g. Select **Next**.

h. In the Destination step, search for and select the data extension that you created in Create a data extension for your Contacts Counts report.

i. Select **Next**.

j. In the Mapping step, select the options **Add and Update** and **Map by Ordinal** in the Data Action header.

k. When prompted, enable the **Import file has column headers** option and then map each data extension attribute to the corresponding column number in the Contacts Counts report.

Note: Leave the **Flag** attribute unmapped.

l. Select **Next**.

m. In the Review step, verify that the import file activity configuration is correct and then select **Finish**.

9. Select **Save**.
10. In the dialog box, fill in the fields.

Save Automation dialog box

Field	Description
Name	Name of the automation.
Description	Description of the automation.
External Key	Optional key that uniquely identifies the automation.
Location	Location in which you want to save the automation.

11. Select **Save**.
12. In the Starting Source section of the workflow canvas, select **Active**.
13. In the Activate Schedule Confirmation dialog box, select **Activate** to activate the automation schedule.

Retrieve Contacts Counts report data manually

After you create the Contacts Counts report, data extension, and automation, you can retrieve report data between your scheduled report and automation jobs by running these jobs manually.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Salesforce Marketing Cloud Role required: admin

About this task
Your Salesforce Marketing Cloud instance runs the report and automation jobs automatically based on the schedules that you define. If you want to retrieve Contacts Counts report data before the next scheduled report and automation jobs, you can run these jobs manually.

Procedure
1. Run your Contacts Counts report.
   a. On the page header of your Salesforce Marketing Cloud instance, hover the Salesforce icon to display the list of available Salesforce Marketing Cloud applications.
   b. Select the **Analytics Builder** app icon and then select **Reports**.
   The Reports app overview opens.
   c. From your list of reports, select the Contacts Counts report that you created in Create a Contacts Counts report in Salesforce Marketing Cloud.
   d. Select **Run**.
   Your Salesforce Marketing Cloud instance generates the report and displays the results on the Results: <*report-name*> page.
   e. On the Results: <*report-name*> page, select the Download Results icon ( ).
   f. In the dialog box, fill in the fields.

Download Results dialog box

Field	Description
Filename	The file name of the report, excluding the file extension.
Report Source	Source of the report. This field is automatically set to **Contacts Counts**.
Format	File type and file extension in which you want to receive the report results. Select **Data File (.csv)**.

   g. Select **Save**.
   h. Save the file in your system.
2. Import the file in your Data Extension.
   a. On the page header of your Salesforce Marketing Cloud instance, hover the Salesforce icon to display the list of available Salesforce Marketing Cloud applications.
   b. Select the **Audience Builder** app icon and then select **Contact Builder**.
   c. Open the recently created Data Extension that you created while creating a data extension for your Contacts Counts report.
   d. Select **Import**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. In the Import Data Confirmation dialog box, select **Import into Data Extension** and then select **Ok**.

f. In the Import into Data Extension step, choose the file that you downloaded in the previous Step 1.

g. Select **Delimiter** as **comma**.

h. Select **Import Type** as **Add and Update**.

i. Select **Import options** as **Skip rows in the import file with bad data**.

j. Select **Next**.

k. In the Configure mapping dialog box, select **Map Manually**.

l. Match the available data extension columns with the imported report columns and leave the Flag column empty.

m. Select **Next**.

n. In the Review and create dialog box, enter the email id on which you want notification when import completes and select **Finish**.

o. In the Run Confirmation dialog box, select **Done**.

Result
The latest Contacts Counts report data is imported into the data extension.

Create a Salesforce Marketing Cloud integration profile using basic authentication

Create an integration profile by using basic authentication to track software subscriptions and optimize stale licenses for the Salesforce Marketing Cloud service.

Before you begin
To create a Salesforce Marketing Cloud integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

Tip: To avoid incurring additional subscription costs, install the plugin and build the integration on a non-production instance.

ServiceNow Role required: sam_integrator

Important: You must select the **Software Asset Management integration with Salesforce Marketing Cloud** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task
If you're using Software Asset Workspace, the option to create the Salesforce Marketing Cloud integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Salesforce Marketing Cloud Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Salesforce Marketing Cloud** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `Salesforce Marketing Cloud integration profile`.
Authentication type	Type of authentication to access Salesforce Marketing Cloud APIs. ○ Basic Auth: Select this value. ○ OAuth 2.0 **Note:** For a new Salesforce Marketing Cloud profile, the authentication type is set to **Basic Auth** by default.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This value is automatically set to **Salesforce Marketing Cloud Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Download Subscriptions**.

> **Note:** The **Download subscriptions** check box is selected by default and you can't clear it.

b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

c. In the Download Consumption Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Download Contacts Consumption**.
The **Download Consumption** check box is selected by default. If you don't want to download the license consumptions, clear this check box.

4. In the Integration Attributes section, add or remove the attributes based on your requirements. The name-value attributes such as **Count Date**, **Contacts**, **Email Contacts**, and **Mobile Contacts** are automatically populated for the integration profile.

> **Note:** The attribute name must match the report column header in Salesforce Marketing Cloud instance. For more information, see Create a data extension for your Contacts Counts report.

5. Select **Save**.
Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_sforce_mc_spoke.SalesforceMarketingCloud**.

6. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
7. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
8. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Please Enter the Connection Information	
Connection Name	Name of the connection.
SOAP Connection URL	URL of your SOAP Connection endpoint. Enter `https://<subdomain>.soap.marketingcloudapis.com/Service.asmx`, where <*subdomain*> is your Salesforce Marketing Cloud subdomain.
Please Enter the Credential Information	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Username Profile Name	Name of your credentials.
Username	User name of the user that you can access the Salesforce Marketing Cloud SOAP API with. Enter the user name of the user that you created in Create a user for accessing the Salesforce Marketing Cloud SOAP API.
Password	Password of the user that you can access the Salesforce Marketing Cloud SOAP API with. Enter the password of the user that you created in Create a user for accessing the Salesforce Marketing Cloud SOAP API.
Please enter additional information used for post processing	
Contacts Counts Data Extension	Name of the data extension that you want to retrieve Contacts Counts report data from. This name must exactly match the name of the data extension that you created in Create a data extension for your Contacts Counts report.

9. Select **Create**.
10. On the Connection & Credential Aliases form header, select the Back button to return to the Integration Profile form.

    Note: You must update the **Connection Alias** field to its pre-upgrade value for the respective Data Extension record in the Configurations [sn_sforce_mc_spoke_configurations] table. Access the Configurations table by navigating to **All** > **Salesforce Marketing Cloud** > **Configurations**.

11. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
    Validating the connection verifies the Download Subscriptions and Download Consumption APIs, but not the Reclaim Subscriptions APIs.
12. After the connection is verified, select **Publish**.
13. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrate Salesforce Marketing Cloud using OAuth 2.0

Integrate your ServiceNow instance with Salesforce Marketing Cloud services by using OAuth 2.0.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Salesforce Marketing Cloud application	Authentication scopes
Download subscriptions	User	Users : Read
Pull user activity	User	Users : Read
Reclaim subscription	User	Users : Write
Download consumptions	User	Data Extensions : Read, Write

Create Salesforce Marketing Cloud OAuth 2.0 credentials

Create Salesforce Marketing Cloud OAuth 2.0 credentials to get access to Salesforce Marketing Cloud APIs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task
The credentials must be created in the Salesforce Marketing Cloud Spoke application scope.

Before you begin
Role required: Salesforce Marketing Cloud admin

About this task
For accessing user licenses and data extension, the connection configuration must be set up in the parent business unit. If the configuration is set up in a child business unit, it might not be able to access data from the parent business unit.

Procedure
1. Log in to the Salesforce Marketing Cloud tenant.
2. Navigate to **Setup Home** > **Platform Tools** > **Apps** > **Installed Packages**.
3. Select **New** to create a package.
4. In the New Package Details dialog box, fill in the **Name** and **Description** fields.
5. Select **Save**.
6. Select **Add Component**.
7. Select **API Integration** to integrate Salesforce Marketing Cloud APIs to your application.
8. Select **Next**.
9. Select **Server-to-Server** as the integration type.
10. Select **Next**.
11. Select the following scopes for your integration.
    - Users : Read
    - Users : Write
    - Data Extensions : Read, Write
12. Select **Save**.
    Your Client Id, Client Secret, and SOAP Base URI are displayed in your configuration summary. Navigate to the Components section under **SETUP** > **INSTALLED PACKAGES** > **DETAILS** to view the Client Id, Client Secret, and SOAP Base URI. Copy the values to use them later.

    Note: Note: You must add `/Service.asmx` in the SOAP Base URI while passing it in your ServiceNow instance.

13. Select the **ACCESS** tab and confirm that your business unit is enabled.

    If your business unit is inactive, select and enable it, then select **Save**.

Create a Contacts Counts report in Salesforce Marketing Cloud

Create a Contacts Counts report to retrieve and display the total number of billable contacts in your Salesforce Marketing Cloud account.

Before you begin
Salesforce Marketing Cloud Role required: admin

Procedure
1. From a web browser, go to your Salesforce Marketing Cloud instance.
2. Log in using your admin credentials.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the page header of your instance, select the business unit profile icon and then select the top-level parent business unit so that your Contacts Counts report includes data for both the parent business unit and all corresponding child business units.
4. From the list of available Salesforce Marketing Cloud applications, select the **Analytics Builder** app icon and then select **Reports**.
   The Reports app overview opens.
5. In the Report Catalog section, select **View Catalog**.
6. From the Reports Catalog, search for **Contacts Counts** and then select **Create**.
   The Create Report dialog box opens.
7. In the dialog box, select the time period that you want to retrieve and display data for from the **Date Range** list.
   The default value is **Last 30 Days**.

   Tip: To avoid performance issues during report generation, you should set this value to **Last 7 Days**.

8. Select **Submit**.
   Your Salesforce Marketing Cloud instance generates the report and displays the results on the Results: Contacts Counts page.
9. On the Results: Contacts Counts page, select **Save**.
   The Save Report dialog box opens.
10. In the dialog box, fill in the fields.

Save Report dialog box

Field	Description
Report Name	Name of the report.
Report Source	Source of the report. This field is automatically set to **Contacts Counts**.
Description	Description of the report.

11. Select **Save**.
12. Create a schedule to run the Contacts Counts report automatically.
    a. On the page header of the Reports app, select the **Overview** tab to return to the Reports app overview.
    b. From your list of reports, open your newly created Contacts Counts report.
    c. In the Schedule Options section, select **Edit**.
    d. In the dialog box, fill in the fields.

Edit Schedule Options dialog box

Field	Description
Schedule Options	
Start	The date and time from which you want to start running the report.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Time Zone	Time zone in which the report is being scheduled.
Repeat	Frequency at which you want to run the report. Configure the report to run once every week on Sundays.
End	Date on which you want to stop running the report.
Delivery Options	
Format	File type and file extension in which you want to receive the report results. Select **Data File (.csv)**.
Location	Location in which you want to save or share the report. Set this field to **Save report for FTP** and then fill in the corresponding fields: ▪ **Report Name**: The file name of the report, excluding the file extension. If you want to include date and time in the report name, add it in the `Reportname_YYYYMMDD_HHMMSS` format. **Note:** Take note of this file name for later use. ▪ **Unique Option**: Option to create a report record instead of replacing the existing report record in SFTP. Leave this check box unselected. ▪ **FTP Location**: Location of your Salesforce Marketing Cloud FTP files. Select **ExactTarget Enhanced FTP** so that the report is saved to your SFTP (SSH File Transfer Protocol) Reports folder. **Note:** You can set up an SFTP user account in Salesforce Marketing Cloud to view the saved files at a specific FTP location. For more information, see Setting up an SFTP user account in Salesforce Marketing Cloud.

e. Select **Save**.

Create a data extension for your Contacts Counts report

Create a data extension to store your Contacts Counts report data on your Salesforce Marketing Cloud instance.

Before you begin

Salesforce Marketing Cloud Role required: admin

About this task

Data extensions are tables that contain attributes representing your report data. When your ServiceNow instance connects with the Salesforce Marketing Cloud service, it retrieves data from this data extension.

Procedure

1. On the page header of your Salesforce Marketing Cloud instance, hover the Salesforce icon to display the list of available Salesforce Marketing Cloud applications.
2. Select the **Audience Builder** app icon and then select **Contact Builder**.
   The Contact Builder app opens.
3. Select the **Data Extensions** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. In the pop-up dialog box, select **Get started** and then select **Create**.
   The Create New Data Extension dialog box opens.
5. In the Properties step, fill in the fields.

Properties fields

Field	Description
Creation Method	Method in which you want to create the data extension. Select **Create from New**.
Name	Name of the data extension.
External Key	Optional key that uniquely identifies the data extension. You can enter a key of your choice.
Description	Description of the data extension.
Type	Type of data extension. This field is automatically set to **Standard**.
Location	Location in which you want to store the data extension. This field is automatically set to **Data Extensions**. Select **Change Location** to select a different location.
Is Sendable?	Option to indicate whether the data extension can be sent to your subscribers.

6. Select **Next**.
7. In the Data Retention Policy step, set the **Retention Setting** field to **Off**.
8. Select **Next**.
9. In the Attributes step, add the attributes that you want to include in the data extension. Attributes are used to map and import data from a report to a data extension. You must create an attribute for each report column that you want to import data from. Each attribute name must exactly match the corresponding report column name.

   For the Salesforce Marketing Cloud integration, attributes for the following Contacts Counts report columns are required:

Attributes fields

Field	Description
Primary Key	Option for the attribute to include a unique identifier for all records in the data extension. This option must be enabled for the **Count_Date** attribute.
Name	Name of the attribute. This name must exactly match the corresponding report column name.
Data Type	Data type of the attribute.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Required	Option that indicates whether the attribute requires a value for each record in the data extension.
Length	Maximum number of characters allowed in the attribute value.
Default Value	Optional default value for the attribute. For the **Flag** attribute, set the default value to `1`. **Note:** Don't enter a default value for any attributes that are assigned as a primary key.

Name	Data Type
Count_Date	Text
Total_Distinct_Contacts_Count	Text
Total_Distinct_Email_Addresses1	Text
Total_Distinct_Mobile_Addresses_Count	Text
Flag	Text

Note: You can add additional attributes and the name must be the same as the Integration Attributes. For more information, see Create a Salesforce Marketing Cloud integration profile using basic authentication or Create a Salesforce Marketing Cloud integration profile using OAuth 2.0.

Attributes for all other Contacts Counts report columns are optional. Fill in the fields for each attribute that you want to add.

10. Select **Complete**.
11. In the Data Extension Created dialog box, select **OK**.

Build an automation to import Contacts Counts report data in your data extension

Create an automation to automatically import Contacts Counts report data into your data extension after the report is generated.

Before you begin

Salesforce Marketing Cloud Role required: admin

Procedure

1. On the page header of your Salesforce Marketing Cloud instance, hover the Salesforce icon to display the list of available Salesforce Marketing Cloud applications.
2. Select the **Journey Builder** app icon and then select **Automation Studio**.
   The Automation Studio app overview opens.
3. Select **New Automation**.
   The workflow for the new automation opens.
4. Create an automation schedule by dragging the **Schedule** icon from the Starting Sources section of the left menu pane to the Starting Source section of the workflow canvas.
5. Define a schedule for the automation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In the Starting Source section of the workflow canvas, select **Configure**.

b. In the dialog box, fill in the fields.

Define Schedule dialog box

Field	Description
Start Date	The date from which you want to start running the automation.
Start Time	The time from which you want to start running the automation.
Time Zone	Time zone in which the automation is being scheduled.
Repeat	The frequency at which you want to run the automation. Configure the automation to run after the Contacts Counts report is generated. Select the same frequency that you had selected while creating a Contacts Counts report in Salesforce Marketing Cloud. **Tip:** If you configure the automation to run on the same day that the report is generated, select a start time that gives enough time for the report to finish generating. ServiceNow recommends a start time of at least two hours after the report start time.
End	Number of times that the automation can run until the automation schedule ends. If you don't want the automation schedule to end, set this field to **Never**. This field doesn't appear only when **None (run once)** is selected from **Repeat**.

c. Select **Done**.

6. Add a script activity to execute the Server-Side JavaScript for all activities that require it.

a. In the Activities section of the left menu pane, drag the **Script** icon into the workflow canvas.
The script activity becomes the first step of the automation workflow.

b. Select **Choose** on the script activity step.
The Choose Script Activity dialog box opens.

c. Select **Create New Script Activity**.
The Create New Script Activity dialog box opens.

d. In the Properties step, fill in the fields.

Properties fields

Field	Description
Name	Name of the script activity.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
External Key	Optional key that uniquely identifies the script activity. You can enter a key of your choice.
Folder Location	The location in which you want to store your scripts. Select **Choose...** to select a different location. This field is automatically set to **Scripts**.
Description	Description of the script activity.

e. Copy and paste the following Server-Side JavaScript into the Server-Side JavaScript text box:

```
<script runat="server">
var rows =
 Platform.Function.DeleteData('*<data-extension-name>*',['Fla
g'],['1']);
</script>
```

The **<data-extension-name>** must exactly match the file name of the Data Extension that you created in Create a data extension for your Contacts Counts report.

f. Select **Validate Syntax** to verify that the Server-Side JavaScript syntax is valid.

g. Select **Next**.

h. In the Summary step, verify that the script activity configuration is correct and then select **Finish**.

7. Add a data extract activity to copy the Contacts Counts report from the SFTP Reports folder to the SFTP Import folder.
The Salesforce Marketing Cloud instance uses the SFTP Import folder to locate and import report data into your data extensions. To enable your instance to import data from the Contacts Counts report into the corresponding data extension, you must copy the report to the SFTP Import folder.

a. In the Activities section of the left menu pane, drag the **Data Extract** icon into the workflow canvas.
The data extract activity becomes the second step of the automation workflow.

b. Select **Choose** on the data extract activity step.
The Choose Data Extract Activity dialog box opens.

c. Select **Create New Data Extract Activity**.
The Create New Data Extract Activity dialog box opens.

d. In the Properties step, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties fields

Field	Description
Name	Name of the data extract activity.
External Key	Optional key that uniquely identifies the data extract activity. You can enter a key of your choice.
File Naming Pattern	The file name of the Contacts Counts report that you want to extract data from. This name must exactly match the file name of the Contacts Counts report that you created in Create a Contacts Counts report in Salesforce Marketing Cloud, including the file extension.
Extract Type	Data extract method. Set this field to **Enhanced FTP File Move and Copy**.
Description	Description of the data extract activity.

e. Select **Next**.

f. In the Configuration step, fill in the fields.

Configuration fields

Field	Description
Input Folder	Location in which you've saved the Contacts Counts report. Enter `\reports\`.
Output Folder	Location that you want to copy the report to. Enter `\Import\`.
Copy To Folder	Option to copy instead of move the report from the input folder to the output folder. This option enables you to keep the report in both locations. Select the check box to enable this option.

g. Select **Next**.

h. In the Summary step, verify that the data extract activity configuration is correct and then select **Finish**.

8. Add an import file activity to import the Contacts Counts report data into the data extension.

a. In the Activities section of the left menu pane, drag the **Data Copy or Import** icon into the workflow canvas.
The Data Copy or Import activity becomes the third step of the automation workflow.

b. Select **Choose** on the Data Copy or Import activity step.
The Choose Data Copy or Import dialog box opens.

c. Select **Create New Copy or Import Definition**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Create New Copy or Import Definition dialog box opens.

d. In the Activity Info step, fill in the fields.

Activity Info fields

Field	Description
Name	Name of the import file activity.
Description	Description of the import file activity.
External Key	Optional key that uniquely identifies the import file activity. You can enter a key of your choice.
Send notification email to	The email address to which you want to send notifications when an import completes. If you specify an email address, a notification email that contains the number of inserted and updated rows is sent to that address on successful import. **Important:** The notification email contains an `Invalid Field Count` validation error due to the presence of empty lines in the imported CSV file. These empty lines appear automatically when you save the report to FTP. However, they have no impact on the integration.

e. Select **Next**.

f. In the Source step, select **File Location** in the Data Source header and fill in the fields.

Import File fields

Field	Description
File Location	Location of the Contacts Counts report that you want to import data from. Select **ExactTarget Enhanced FTP**.
File Naming Pattern	The file name of the Contacts Counts report that you want to import data from. If you want to include date and time in the report name, add it in the `Reportname_YYYYMMDD_HHMMSS` format by selecting the **Date variable** and **Time variable** fields. This name must exactly match the file name of the Contacts Counts report that you created in Create a Contacts Counts report in Salesforce Marketing Cloud, including the file extension.
Date Format	Format in which you want to display the date and time of the report data.
Delimiter	Format in which you want to separate each report record. Select **comma** to separate each record with a comma. If you want to enable the use of double quotes to separate each record, enable the **Respect double quotes (") as a text delimiter** option.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Bad Data Behavior	Option to skip rows with bad data. Select the check box to enable this option.

g. Select **Next**.

h. In the Destination step, search for and select the data extension that you created in Create a data extension for your Contacts Counts report.

i. Select **Next**.

j. In the Mapping step, select the options **Add and Update** and **Map by Ordinal** in the Data Action header.

k. When prompted, enable the **Import file has column headers** option and then map each data extension attribute to the corresponding column number in the Contacts Counts report.

> **Note:** Leave the **Flag** attribute unmapped.

l. Select **Next**.

m. In the Review step, verify that the import file activity configuration is correct and then select **Finish**.

9. Select **Save**.
10. In the dialog box, fill in the fields.

Save Automation dialog box

Field	Description
Name	Name of the automation.
Description	Description of the automation.
External Key	Optional key that uniquely identifies the automation.
Location	Location in which you want to save the automation.

11. Select **Save**.
12. In the Starting Source section of the workflow canvas, select **Active**.
13. In the Activate Schedule Confirmation dialog box, select **Activate** to activate the automation schedule.

Retrieve Contacts Counts report data manually

After you create the Contacts Counts report, data extension, and automation, you can retrieve report data between your scheduled report and automation jobs by running these jobs manually.

Before you begin

Salesforce Marketing Cloud Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Your Salesforce Marketing Cloud instance runs the report and automation jobs automatically based on the schedules that you define. If you want to retrieve Contacts Counts report data before the next scheduled report and automation jobs, you can run these jobs manually.

Procedure

1. Run your Contacts Counts report.
   a. On the page header of your Salesforce Marketing Cloud instance, hover the Salesforce icon to display the list of available Salesforce Marketing Cloud applications.
   b. Select the **Analytics Builder** app icon and then select **Reports**.
   The Reports app overview opens.
   c. From your list of reports, select the Contacts Counts report that you created in Create a Contacts Counts report in Salesforce Marketing Cloud.
   d. Select **Run**.
   Your Salesforce Marketing Cloud instance generates the report and displays the results on the Results: <*report - name*> page.
   e. On the Results: <*report - name*> page, select the Download Results icon ( ).
   f. In the dialog box, fill in the fields.

Download Results dialog box

Field	Description
Filename	The file name of the report, excluding the file extension.
Report Source	Source of the report. This field is automatically set to **Contacts Counts**.
Format	File type and file extension in which you want to receive the report results. Select **Data File (.csv)**.

   g. Select **Save**.
   h. Save the file in your system.
2. Import the file in your Data Extension.
   a. On the page header of your Salesforce Marketing Cloud instance, hover the Salesforce icon to display the list of available Salesforce Marketing Cloud applications.
   b. Select the **Audience Builder** app icon and then select **Contact Builder**.
   c. Open the recently created Data Extension that you created while creating a data extension for your Contacts Counts report.
   d. Select **Import**.
   e. In the Import Data Confirmation dialog box, select **Import into Data Extension** and then select **Ok**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

f. In the Import into Data Extension step, choose the file that you downloaded in the previous Step 1.

g. Select **Delimiter** as **comma**.

h. Select **Import Type** as **Add and Update**.

i. Select **Import options** as **Skip rows in the import file with bad data**.

j. Select **Next**.

k. In the Configure mapping dialog box, select **Map Manually**.

l. Match the available data extension columns with the imported report columns and leave the Flag column empty.

m. Select **Next**.

n. In the Review and create dialog box, enter the email id on which you want notification when import completes and select **Finish**.

o. In the Run Confirmation dialog box, select **Done**.

Result
The latest Contacts Counts report data is imported into the data extension.

Create a Salesforce Marketing Cloud integration profile using OAuth 2.0

Create a Salesforce Marketing Cloud integration profile by using OAuth 2.0 to track software subscriptions and optimize stale licenses for the Salesforce Marketing Cloud service.

Before you begin
To create a Salesforce Marketing Cloud integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

Tip: To avoid incurring additional subscription costs, install the plugin and build the integration on a non-production instance.

ServiceNow Role required: sam_integrator

Salesforce Marketing Cloud Role required: sn_sforce_mc_spoke.Salesforce Marketing Cloud Admin

Important: You must select the **Software Asset Management integration with Salesforce Marketing Cloud** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task
If you're using Software Asset Workspace, the option to create the Salesforce Marketing Cloud integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Salesforce Marketing Cloud Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Salesforce Marketing Cloud** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `Salesforce Marketing Cloud integration profile`.
Authentication type	Type of authentication to access Salesforce Marketing Cloud APIs. ○ Basic Auth ○ OAuth 2.0: Select this value. **Note:** For a new Salesforce Marketing Cloud profile, the authentication type is set to **Basic Auth** by default.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This value is automatically set to **Salesforce Marketing Cloud Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Download Subscriptions**.

> **Note:** The **Download subscriptions** check box is selected by default and you can't clear it.

b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

c. In the Download Consumption Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Download Contacts Consumption**.

4. In the Integration Attributes section, add or remove the attributes based on your requirements. The name-value attributes such as **Count Date**, **Contacts**, **Email Contacts**, and **Mobile Contacts** are automatically populated for the integration profile.

> **Note:** The attribute name must match the report column header in Salesforce Marketing Cloud instance. For more information, see Create a data extension for your Contacts Counts report.

5. Select **Save**.
Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_sforce_mc_spoke.SalesforceMarketingCloudSOAPConnection**.

6. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
7. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
8. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Information	
Connection Name	Name of the connection. For example, `SFMC SOAP Connection`.
SOAP Connection URL	URL of your SOAP Connection endpoint. Enter `https://<subdomain>.soap.marketingcloudapis.com/Service.asmx`, where `<subdomain>` is your Salesforce Marketing Cloud subdomain.
Credential Information	
OAuth Client ID	Client ID that you generated while creating a Salesforce Marketing Cloud OAuth credential.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
OAuth Client Secret	Client Secret that you retrieved while creating a Salesforce Marketing Cloud OAuth credential.
OAuth Redirect URL	`https://<instance_name>/oauth_redirect.do`, where the instance name is the name of your ServiceNow instance.
Additional information used for post processing	
Contacts Counts Data Extension	Name of the data extension that you want to retrieve Contacts Counts report data from. This name must exactly match the name of the data extension that you created in Create a data extension for your Contacts Counts report.

9. Select **Create and Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

10. Select **Save**.
11. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
    Validating the connection verifies the Download Subscriptions and Download Consumption APIs, but not the Reclaim Subscriptions APIs.
12. After the connection is verified, select **Publish**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Create additional Salesforce Marketing Cloud integration profiles

Create an integration profile for each additional Salesforce Marketing Cloud that you want to track software subscriptions and optimize licensing for.

Before you begin

To create a Salesforce Marketing Cloud integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store

Role required: sam_integrator

Salesforce Marketing Cloud Role required: sn_sforce_mc_spoke.Salesforce Marketing Cloud Admin

Important: You must select the **Software Asset Management integration with Salesforce Marketing Cloud** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Salesforce Marketing Cloud integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Salesforce Marketing Cloud Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Salesforce Marketing Cloud** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `Salesforce Marketing Cloud integration profile`.
Authentication type	Type of authentication to access Salesforce Marketing Cloud APIs. ○ Basic Auth ○ OAuth 2.0: Select this value. **Note:** For a new Salesforce Marketing Cloud profile, the authentication type is set to **Basic Auth** by default.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This value is automatically set to **Salesforce Marketing Cloud Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Download Subscriptions**.

> **Note:** The **Download subscriptions** check box is selected by default and you can't clear it.

b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

c. In the Download Consumption Subflow section, verify that the **Subflow** field is set to **Salesforce Marketing Cloud Download Contacts Consumption**.
The **Download Consumption** check box is selected by default. If you don't want to download the license consumptions, you can clear this check box.

4. In the Integration Attributes section, add or remove the attributes based on your requirements. The name-value attributes such as **Count Date**, **Contacts**, **Email Contacts**, and **Mobile Contacts** are automatically populated for the integration profile.

> **Note:** The attribute name must match the report column header in Salesforce Marketing Cloud instance. For more information, see Create a data extension for your Contacts Counts report.

5. Select **Save**.
Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_sforce_mc_spoke.SalesforceMarketingCloudSOAPConnection**.

6. Select the preview icon next to the **Connection & Credential** field to open the connection & credential aliases record.
7. Select **Open Record** in the record preview.
8. On the Connection & Credential Aliases form, create a child alias that can uniquely identify the connection and credentials for this integration profile.
The first Salesforce Marketing Cloud integration profile that you create uses the default (parent) connection and credential alias for Salesforce. Each additional Salesforce Marketing Cloud integration profile that you create requires a unique child alias that helps differentiate the connection and credentials between each integration profile.

   a. Select the link under **Child Aliases** > **Parentalias=***** to add child aliases.

   b. Select **New**.
   The Connection & Credential Aliases form for the child alias opens.

   c. Enter a name for the child alias in the **Name** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

d. Right-click the form header and then select **Save**.

e. After the form reloads, select the **Create New Connection & Credential** related link.

9. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Information	
Connection Name	Name of the connection. For example, `SFMC SOAP Connection`.
SOAP Connection URL	URL of your SOAP Connection endpoint. Enter `https://<subdomain>.soap.marketingcloudapis.com/Service.asmx`, where <*subdomain*> is your Salesforce Marketing Cloud subdomain.
Credential Information	
OAuth Client ID	Client ID that you generated while creating a Salesforce Marketing Cloud OAuth credential.
OAuth Client Secret	Client Secret that you retrieved while creating a Salesforce Marketing Cloud OAuth credential.
OAuth Redirect URL	`https://<instance_name>/oauth_redirect.do`, where the instance name is the name of your ServiceNow instance.
Additional information used for post processing	
Contacts Counts Data Extension	Name of the data extension that you want to retrieve Contacts Counts report data from. This name must exactly match the name of the data extension that you created in Create a data extension for your Contacts Counts report.

10. Select **Create and Get OAuth Token**.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

11. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
Validating the connection verifies the Download Subscriptions and Download Consumption APIs, but not the Reclaim Subscriptions APIs.

12. After the connection is verified, select **Publish**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Setting up an SFTP user account in Salesforce Marketing Cloud

Set up an SSH File Transfer Protocol (SFTP) user account to access your Salesforce Marketing Cloud FTP files.

Creating an SFTP user account enables you to access the Contacts Counts reports that are saved at an FTP location. The Contacts Counts report displays the total number of billable contacts in your Salesforce Marketing Cloud account.

Create an SFTP User Account in Salesforce Marketing Cloud

Create user accounts for SFTP users in Salesforce Marketing Cloud to access the Contacts Counts report.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Salesforce Marketing Cloud Role required: admin with privileges to create users and roles

About this task

Note: You can create a limited number of active SFTP user accounts per member ID (MID). For more information, see Salesforce documentation.

Procedure

1. From a web browser, open your Salesforce Marketing Cloud instance.
2. Log in using your admin credentials.
3. On the page header of your instance, select your profile icon and then select **Setup**.
4. In the **Quick Find** box, enter `ftp` and then select **FTP Accounts**.
5. Select **Create User**.
6. Enter the email address and password for the new user.
7. In the Authentication Options window, select **Select Password** as the authentication method for the user.
8. In the Permissions window, select the permissions to apply to each directory.

   Important: Each directory inherits the permissions of its subdirectories. Select all the permissions that provide you access to all the folders for viewing, downloading, and managing files.

9. Permit SFTP connections only from a specific IP address by entering the address in the **Allowlist IPs** field.
10. Select **Add**.
11. Repeat step 9 for each IP address that you want to permit.

    Note: If you don't enter any IP addresses, SFTP connections can be opened from any IP address.

12. In the Folders window, select a home directory for the user.

    The user is allowed to access only the selected directory and its subdirectories. You can select the Root folder to see all the directories and subdirectories.

13. Save your changes.
    You can also exclude an SFTP user from password expiration. For more information, see Salesforce documentation.

Set Up an External FTP File Location in Salesforce Marketing Cloud

Set up a file location to connect to an external FTP site when transferring files. The file location contains the site URL, port, and login details that Salesforce Marketing Cloud uses to access your site.

Before you begin

Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. In your Salesforce Marketing Cloud instance, navigate to **Setup**.
2. In the **Quick Find** box, enter `file` and then select **File Locations**.
3. Select **Create**.
4. In the Properties section, fill in the fields.

File location properties

Field	Description
Name	A unique name that you can recognize when you create an activity in Salesforce Marketing Cloud.
External Key	A unique key that identifies the file location when using the API.
Description	Details to identify the file location when you create an activity in Salesforce Marketing Cloud.

5. Select **Enhanced FTP Site Import Directory** as the location type.
6. Save the file.

Related topics

Integrate Salesforce Marketing Cloud using basic authentication

Integrate Salesforce Marketing Cloud using OAuth 2.0

Integrating with SAP Ariba

Integrating your Software Asset Management application with the SAP Ariba application enables you to track your software subscriptions and reclaim unused licenses.

Important:

This integration retrieves user subscription details, tracks last login date, and identifies low-usage for the following SAP Ariba applications:

- Ariba Sourcing
- Ariba Supplier Performance Management
- Ariba Contract Management

Download reports for SAP Ariba users consuming licenses

Before setting up an SAP Ariba integration profile, generate and download reports for all users who are currently using SAP Ariba licenses.

Before you begin

Role required: SAP Ariba admin

About this task

For setting up an SAP Ariba integration profile, the following SAP Ariba reports are required.

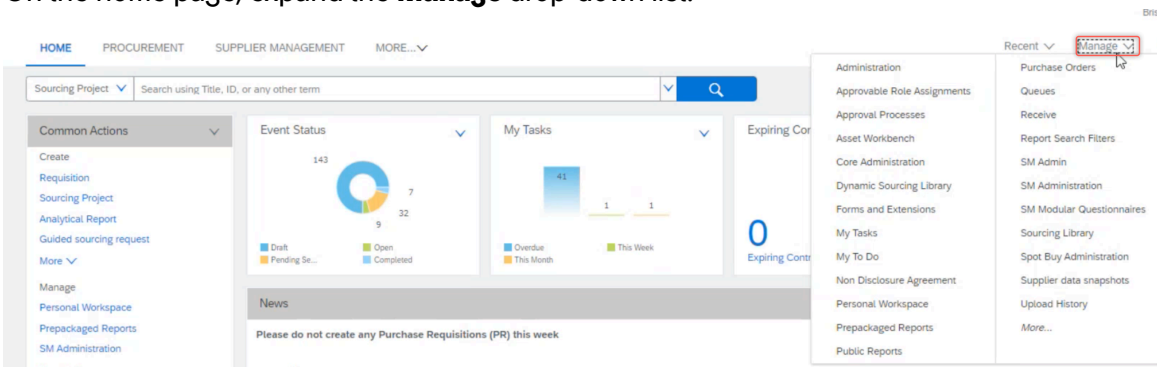
- Sourcing - User Names and Permissions
- Contract Usage Reports

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Number of Users Creating Projects
- Supplier Performance Managements (SPM) Project Report

Procedure

1. Log in to SAP Ariba portal with your admin credentials.
2. On the home page, expand the **Manage** drop-down list.



3. Select **Prepackaged Reports**.

> **Tip:** If you don't find this menu item directly under the **Manage** drop-down list, select **More...** and then select **Prepackaged Reports** from the Reports section.

4. Download the Sourcing - User Names and Permissions, Contract Usage Reports, and Number of Users Creating Projects reports.

   a. On the Prepackaged Reports page, search for and select **System and Benchmark Usage Reports** and then select **Open**.

   b. On the System and Benchmark Usage Reports page, select **System Usage Reports** and then select **Open**.
   The list of System Usage reports is displayed, where you can find Contract Usage Reports and Sourcing Usage Reports.

   c. Save and export the Sourcing - User Names and Permissions report.

      i. On the System Usage Reports page, expand the **Sourcing Usage Reports** drop-down list.

      The Sourcing-User and Permissions report is displayed.

      ii. Scroll down and select **Sourcing-User Names and Permissions** and then select **Open**.

      The Sourcing - User Names and Permissions report gets displayed.

      iii. Select **Save...**.

      As the Sourcing - User Names and Permissions report is a default report, you must not edit it.

      iv. On the Save Report page, select the **Current Project** field as **Personal Workspace**.

> **Important:** To change the file name when saving the report, provide the name in the format `Sourcing-User Names and Permissions`. You might include prefixes or suffixes as needed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

v. Select **Save**.

vi. Export the saved report to your system in `.csv` format by selecting **Export**.

d. Save and export the Contract Usage Reports.

i. On the System Usage Reports page, search for and select **All Contract Workspaces** and then select **Open**.

ii. On the All Contract Workspaces page, filter the report according to your requirements by selecting **Edit**.

You can select a date range for the report you want to generate.

iii. Add a field or a hierarchy from the General Contract Workspace list in the report by selecting the **Pivot Layout** step.

For example, if you want to add the User Type field data to Detail Fields, select and hold (or right-click) it and then select **Detail Field**. You can add your required data to either Row Fields, Column Fields, or Detail Fields.

iv. After your required fields are added, select **Next**.

> **Important:** If the **All Owners - User ID** field isn't included in the report, you must add it.

v. Select **Done**.

In the **Pivot table** tab, the Detail View section displays the fields you have added in a tabular format.

> **Tip:** If you can't see the fields that you selected, verify that you have selected the **Detail View** format.

vi. Select **Save...**.

vii. On the Save Report page, select the **Current Project** field as **Personal Workspace**.

> **Important:** To change the file name when saving the report, provide the name in the format `Contract Usage Reports`. You might include prefixes or suffixes as needed.

viii. Select **Save**.

ix. Export the saved report to your system in `.csv` format by selecting **Export**.

e. Save and export the Number of Users Creating Projects report.

i. On the System Usage Reports page, expand the **Sourcing Usage Reports** drop-down list and then select **Open**.

The System Usage Reports are displayed.

ii. Expand **Sourcing Usage Reports** and scroll down.

You can view Number of Users Creating Projects.

iii. Select **Number of Users Creating Projects** and then select **Open**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

iv. On the Number of Users Creating Projects page, filter the report according to your requirements by selecting **Edit**.

You can select a date range for the report you want to generate.

v. Add a field or a hierarchy from the Sourcing Project list in the report by selecting the **Pivot Layout** step.

For example, if you want to add the Start Date field data, select and hold (or right-click) it and then select **Row Field**. You can add your required data to either Row Fields, Column Fields, or Detail Fields.

vi. After your required fields are added, select **Next**.

> **Important:** If the **All Owners - User ID** field isn't included in the report, you must add it.

vii. Select **Done**.

In the **Pivot table** tab, the Detail View section displays the fields you have added in a tabular format.

> **Tip:** If you can't see the fields that you selected, verify that you have selected the **Detail View** format.

viii. Select **Save...**.

ix. On the Save Report page, select the **Current Project** field as **Personal Workspace**.

> **Important:** To change the file name when saving the report, provide the name in the format `Number of Users Creating Projects`. You might include prefixes or suffixes as needed.

x. Select **Save**.

xi. Export the saved report to your system in `.csv` format by selecting **Export**.

5. Save and export the SPM Project Report.

a. On the Prepackaged Reports page, search for and select **Supplier Performance Management Reports** and then select **Open**.

b. On the Supplier Performance Management Reports page, select **SPM Project Report** and then select **Open**.

c. Select a date range for which you want the report and select **View Report**.

> **Tip:** If you can't see the fields that you selected, verify that you have selected the **Detail View** format.

d. Filter the report according to your requirements by selecting **Edit**.

e. Add a field or a hierarchy from the SPM Project list in the report by selecting the **Pivot Layout** step.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For example, if you want the Calendar data in Column Fields, select and hold (or right-click) it and then select **Column Field**. You can add your required data to Row Fields, Column Fields, or Detail Fields.

f. After your required fields are added, select **Next**.

> **Important:** If the **All Owners - User ID** field isn't included in the report, you must add it.

g. Select **Done**.
In the **Pivot table** tab, the Detail View section displays the fields you have added in a tabular format.

> **Tip:** If you can't see the fields that you selected, verify that you have selected the **Detail View** format.

h. Select **Save...**.

i. On the Save Report page, select the **Current Project** field as **Personal Workspace**.

> **Important:** To change the file name when saving the report, provide the name in the format `SPM Project Report`. You might include prefixes or suffixes as needed.

j. Select **Save**.

k. Export the saved report to your system in `.csv` format by selecting **Export**.

Create an SAP Ariba integration profile

Create an SAP Ariba integration profile to track software subscriptions and optimize licensing for your SAP Ariba applications.

Before you begin

The Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) must be installed from the ServiceNow Store.

For publishing the integration profile, change the application scope to **Global**.

ServiceNow Role required: sam_integrator

About this task

If you're using Software Asset Workspace, the option to create the SAP Ariba integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **SAP Ariba Integration Profile**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **SAP Ariba** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `Ariba Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This field is automatically set to `Ariba Subscription`.

3. View the required user roles or API permissions to minimize security risks and optimize SaaS licenses.

   In the Download Subscription Subflow section, verify that the **Subflow** field is set to**SAP Ariba Download Subscriptions**. The **Download subscriptions** check box is selected by default and you can't clear it.

4. Select **Save**.
5. After the integration profile is saved, upload the attachments by selecting the **Attach** icon .
6. On the Attachments pane, drag or select the files in the `.csv` format that you want to upload one by one or together.

   Important: Upload the SAP Ariba reports regularly to view the most recent data.

   After the files are uploaded successfully, the Subscription Stagings [samp_subscription_staging] table gets populated with the uploaded data.
7. Select **Publish**.
   After the integration profile is published, the files attached to the profile are deleted automatically.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with SAP S/4HANA Cloud Public Edition

Integrating your Software Asset Management application with the SAP S/4HANA Public Cloud application enables you to track your software subscriptions and optimize licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important:

You must request and install the following applications from ServiceNow Store:

- SaaS License Management plugin (com.sn_sam_saas_int)
- Software Asset Management Professional for SAP plugin (com.sn_samp_sap)
- SAP S/4HANA Spoke plugin (sn_s4_hana_cld_spk)
- Software Asset Management integration with SAP S/4HANA plugin (sn_sam_s4hanacloud)

Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the SAP S/4HANA application	Authentication scopes
Download subscriptions	Business user	users:read

Create a communication system and user for SAP S/4HANA Public Cloud

Create a communication system and an inbound user to enable access to the SAP S/4HANA Public Cloud API and receive a user name and password for basic authentication.

Before you begin

The SAP S/4HANA Public Cloud Integration Hub spoke must be active. For more information, see SAP S4 HANA Public Cloud Spoke.

SAP S/4HANA Role required: Business user

Procedure

1. Log in to the SAP Fiori launchpad using your business user credentials.
2. From the Communication Management catalog, select the **Communication Systems** application.
3. Select **New**.
4. In the **New Communication System** window, enter a unique system ID in the **System ID** field.
   For example, `SAP S/4HANA Cloud source system`.
5. Enter a unique name for the communication system in the **System Name** field.
   For example, `Integration_System_SNOW`.
6. Select **Create**.
   The system ID and system name that you created appear in the corresponding fields in the General tab.
7. In the Technical Data section, enter the host name of the SAP S/4HANA Cloud source system in the **Host Name** field.
   For example, `localhost`.
8. Select the **Users for Inbound Communication** tab.
9. Create an inbound communication user, by selecting the **+** button.
10. In the New Inbound Communication User window, select **User Name and Password** in the **Authentication Method** field.
11. Select **New User**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

12. In the Create Communication User window, enter the appropriate values in the **User Name**, **Description**, and **Password** fields.
13. Select **Create**.
    You're redirected to the New Inbound Communication User window.
14. Select **OK**.
    The new user appears in the list of Users for Inbound Communication.

> **Important:** There are a few communication arrangements that require a user for outbound communication even if you're using it for inbound communication only. You can create a dummy user for outbound communication from the Users for Outbound Communication tab.

15. Select **Save**.

Create a communication arrangement for SAP S/4HANA Public Cloud

Create a communication arrangement to enable access to the SAP S/4HANA Public Cloud API.

Before you begin

SAP S/4HANA Role required: Business user

Procedure

1. Log in to the SAP Fiori launchpad using your business user credentials.
2. From the Communication Management catalog, select the **Communication Arrangements** application.
3. Select **New**.
4. In the New Communication Arrangement window, select **SAP_COM_0889** as the communication scenario.
   For information on communication scenarios for the specific APIs, see SAP S/4HANA Public Cloud APIs.
5. Enter a unique communication arrangement name in the **Arrangement Name** field.
6. Select **Create**.
7. In the **Communication System** field under the Common Data section, select the communication system you created earlier.
   For example, `Integration_System_SNOW`.

   The **User Name** field for the selected communication system and the **Authentication Method** field associated with the communication scenario get automatically populated.
8. Select **Save**.

Create an SAP S/4HANA integration profile

Create an SAP S/4HANA integration profile to track software subscriptions and optimize licensing for your SAP S/4HANA applications.

Before you begin

The Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) must be installed from the ServiceNow Store.

For publishing the integration profile, change the application scope to **Global**.

ServiceNow Role required: sam_integrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You must select the **Software Asset Management integration with SAP S4Hana Cloud** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the SAP S/4HANA integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **SAP S4Hana Cloud Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscription** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **SAP S4Hana Cloud** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile

Field	Description
Display name	Name of the integration profile. For example, `SAP S/4HANA Cloud`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This field is automatically set to **SAP S4Hana Cloud Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.
For more information about the required roles and scopes, see Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **SAP S4Hana Public Cloud Download Subscriptions**.

   Note: The **Download subscriptions** check box is selected by default and you can't clear it.

5. Select **Save**.
   A draft integration profile is created.

   The **Connection & Credential** field appears and is automatically set to **sn_s4_hana_cld_spk.SAP_S4_HANA_Cloud**.

6. Open the connection & credential aliases record by selecting the preview icon beside the **Connection & Credential** field.
7. Select **Open Record** in the record preview.
8. Select the **Create New Connection & Credential** related link.
9. On the form, fill in the fields.

Create Connection and Credential form

Field	Description
Connection Name	A unique name for the connection. For example, `SAP S4 HANA Cloud`.
Connection URL	The URL to connect to the SAP S/4HANA public cloud instance. For example, `https://demo.s4hana.cloud.sap`.
User Name	User name for the credential record.
Password	Password for the credential record.

10. Select **Create**.
11. On the Integration Profile form, select **Validate Connection** to verify the connection and credential details of this integration.
12. Select **Publish**.
13. In the Publish Confirmation dialog box, select **OK**.
    After the integration profile is published, it appears in the Direct Integration Profiles list.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Integrating with SAP SuccessFactors

Integrating your Software Asset Management application with the SAP SuccessFactors application enables you to track your software subscriptions and to reclaim unused licenses.

Important:

You must request and install the following applications from ServiceNow Store:

- SaaS License Management
- SuccessFactors Spoke
- Software Asset Management integration with SuccessFactors

- If your installed SAP SuccessFactors spoke version is 3.1.5 or lower, follow these steps:
  1. Set up basic authentication for SAP SuccessFactors
  2. Create an SAP SuccessFactors connection
  3. Create an SAP SuccessFactors integration profile
- If your installed SAP SuccessFactors spoke version is 4.0.0 or higher, follow these steps:
  1. Register OAuth application in SuccessFactors
  2. Upload the JKS certificate in your ServiceNow instance
  3. Register SuccessFactors as an OAuth provider
  4. Create the SAML2 assertion producer record
  5. Create credential record for the OData API
  6. Create connection record for the OData API
  7. Create an SAP SuccessFactors integration profile

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the SAP SuccessFactors application	Authentication scopes
Download subscriptions	admin	None
Pull user activity	admin	None
Reclaim subscription	admin	None

Set up basic authentication for SAP SuccessFactors

Set up basic authentication to enable access to the SAP SuccessFactors API.

Before you begin

SAP SuccessFactors Role required: admin

Procedure

1. Log in to the SAP SuccessFactors instance using your admin credentials.
2. On the page header of your instance, select **Home** > **Admin Center**.
3. Create a group to assign API access permissions to.

   Tip: Include only non-admin users in this group, as admin users automatically have access to the SuccessFactors API.

   a. In the **Tool Search** field of the Admin Center, search for and select **Manage Permission Groups**.

   b. On the Permission Group dialog box, enter a name for the permission group in the **Group Name** field.

   c. In the Choose Group Members section, specify the users or user groups that you want to include in this permission group by adding them to a People Pool.

   People Pools allow you to specify the sets of users or user groups that you want to include or exclude for a permission group. You can either include all users and user groups in a single People Pool or group them into different People Pools. For example, you can create different People Pools for each department or office location within your organization.

   To add users or user groups to a People Pool, select an identification category, such as **Username**, and then enter each user or user group in the corresponding text box. Each entry must be separated by a comma.

   You can apply multiple identification categories to a single People Pool by clicking **Add another category**. You can also add additional People Pools by clicking **Add another People Pool**.

   d. **Optional:** In the Exclude these people from the group section, specify the users or user groups that you want to exclude from this permission group by adding them to a People Pool.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

(Optional) To add users or user groups to a People Pool, select an identification category, such as **Username**, and then enter each user or user group in the corresponding text box. Each entry must be separated by a comma.

You can apply multiple identification categories to a single People Pool by clicking **Add another category**. You can also add additional People Pools by clicking **Add another People Pool**.

e. Select **Done**.

4. Configure API access permissions for your group.

a. In the **Tool Search** field of the Admin Center, search for and select **Manage Permission Roles**.

b. Select **Create New**.

c. On the Permission Role Detail form, enter a name for the permission role in the **Role Name** field.

d. **Optional:** Enter a description for the permission role in the **Description** field.

e. Under Permission settings, select **Permission...**.

f. In the Permission settings dialog box, select **Manage Integration Tools** from the left navigation pane.

g. Select the **Allow Admin to Access OData API through Basic Authentication** check box.

h. Select **Employee Central API** from the left navigation pane.

i. Select the **Employee Central HRIS OData API (editable)** check box.

j. Select **Done**.
The dialog box closes and you return to the Permission Role Detail form.

k. Under the **Grant this role to...** tab, select **Add...** to search for and select the permission groups that you created in step 4.
Adding this permission group allows the associated users and user groups to access the APIs that are enabled in this permission role.

l. Select **Save Changes**.

Create an SAP SuccessFactors connection

Create a connection between your SAP SuccessFactors OData API and your ServiceNow instance.

Before you begin

ServiceNow Role required: sam_integrator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From your ServiceNow instance, navigate to **Process Automation** > **Flow Designer**.
   The Flow Designer launches in a new tab.
2. Select the **Connections** tab.
3. Select **View Details** for your SuccessFactors_OData connection.
4. From the list of available connections, search for and select SuccessFactors_OData.
5. Select **Configure**.
6. In the Configure Connection dialog box, fill in the fields.

Configure Connection dialog box

Field	Description
Connection Name	Name of the SuccessFactors_OData connection.
Connection URL	OData API URL of your SAP SuccessFactors instance.
User name	Username for your SAP SuccessFactors admin account. Enter the same username that you used to log in to your SAP SuccessFactors instance in Set up basic authentication for SAP SuccessFactors.
Password	Password for your SAP SuccessFactors admin account. Enter the same password that you used to log in to your SAP SuccessFactors instance in Set up basic authentication for SAP SuccessFactors.

7. Select **Configure Connection**.

Register OAuth application in SuccessFactors

Enable client certificate authentication for the outbound communication from SAP Master Data service by generating the `keystore.jks` and `keystore.cer` files.

Before you begin

Role required: admin

Procedure

1. Create a JKS certificate by using any one of the following methods:
   - Follow the steps in the Creating Java Keystore(JKS) with Private Key and Certificate Chain topic SAP Help Portal.
   - Install Java JDK 8 and Open SSL and execute the following commands in the Terminal:
     a. `openssl genrsa -out private.key 2048`

        The `private.key` file is generated.

     b. `openssl rsa -in private.key -pubout -out public.key`

        Extract the public key from key pair type.

     c. `openssl req -new -x509 -key private.key -out publickey.cer -days 365`

        Enter details of the Distinguished Name (DN). The `publickey.cer` file is generated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

d. `openssl pkcs12 -export -in publickey.cer -inkey private.key -out successfactors.p12 -name "successfactors"`

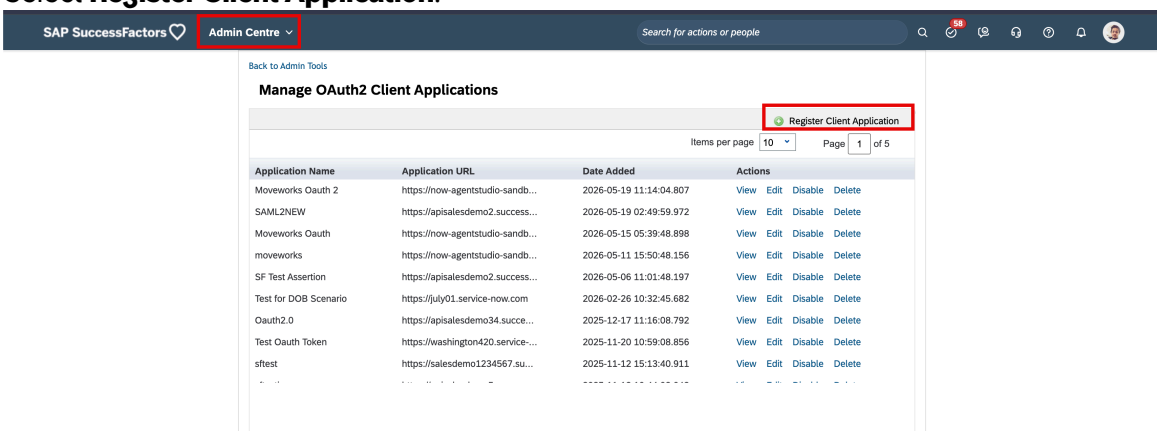
   You're prompted for a password. The `successfactors.p12` file is generated using the private and public key created in step a and step b.

e. `keytool -importkeystore -srckeystore successfactors.p12 -srcstoretype pkcs12 -destkeystore successfactors.jks`

   You're prompted for the destination and source file password. The `successfactors.jks` file is created using the `successfactors.p12` file created in step c.

> **Note:** Confirm that you enter the same passwords in steps c and d. For example, if you enter the password as `123456` in step c, you must enter `123456` as password in step d too.

2. Log in to the SuccessFactors account as an admin.
3. Navigate to **Admin Centre** and select **Company Settings**.
4. Select **Manage OAuth2 Client Applications**.
5. Select **Register Client Application**.



6. In the **X.509 Certificate** field, provide the contents of the `publickey.cer` file (public key) without the headers.
7. Select **Submit**.

Result
The API Key is generated and displayed.

What to do next
Copy the API key generated and record the value for later use.

Upload the JKS certificate in your ServiceNow instance

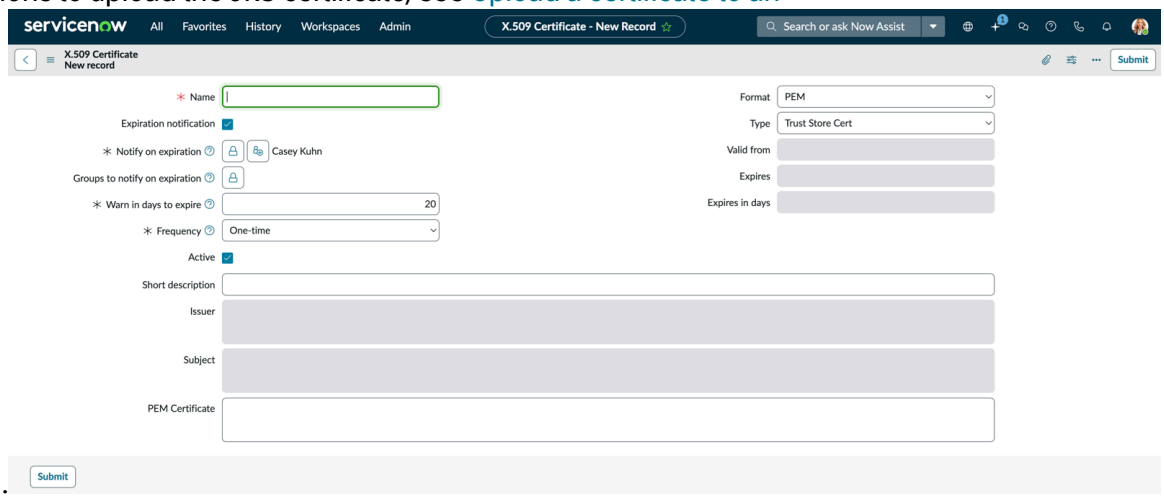
Enable client certificate authentication for the outbound communication by uploading the JKS certificate in your ServiceNow instance.

Before you begin
Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Log in to your ServiceNow instance as an admin.
2. Upload the JKS certificate to your ServiceNow instance.
   For instructions to upload the JKS certificate, see Upload a certificate to an instance.



Register SuccessFactors as an OAuth provider

Use the API key generated during the client application configuration to register the application as an OAuth provider.

Before you begin

Change the application scope to SuccessFactors spoke.

Role required: admin

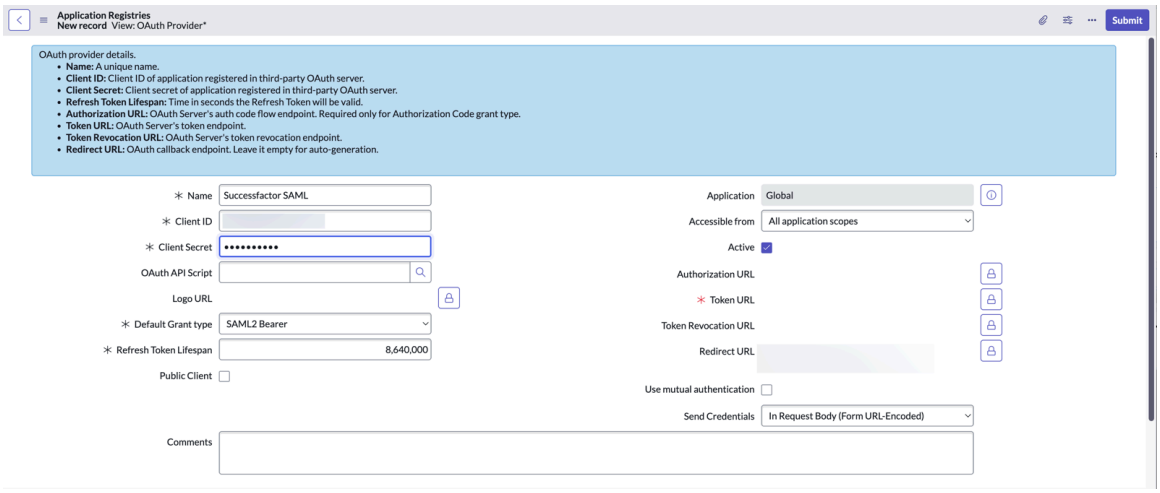
Procedure

1. In your ServiceNow instance, navigate to **System OAuth** > **Application Registry**.
2. Select **New**.
3. In the form, fill in these fields.

Field	Description
Name	Unique name to identify the certificate. For example, `SuccessFactors SAML`.
Client ID	Value of the API key you had copied after registering the OAuth client application in SuccessFactors.
Client Secret	**Note:** Client secret isn't needed to register the application as an OAuth provider. You can provide any value for this field.
Default Grant Type	Default grant type used to establish the token. Select **SAML2 Bearer**.
Token URL	SuccessFactors OAuth server endpoint URL that includes the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Company ID in this format: `https://<SuccessFactors_Instance_Name>/oauth/token?company_id=<Company_ID>`. For example, `https://example.successfactors.eu/oauth/token?company_id=SFCPART123456`.



4. Select **Submit**.

Create the SAML2 assertion producer record

Create a SAML2 assertion record to generate the SAML2 assertion and exchange the assertion for the access tokens with the provider.

Before you begin

Change the application scope to SuccessFactors spoke.

Role required: admin

Procedure

1. Create a SAML2 assertion producer record in your instance.

   a. Navigate to **All** > **System OAuth** > **SAML2 Assertion Producers**.

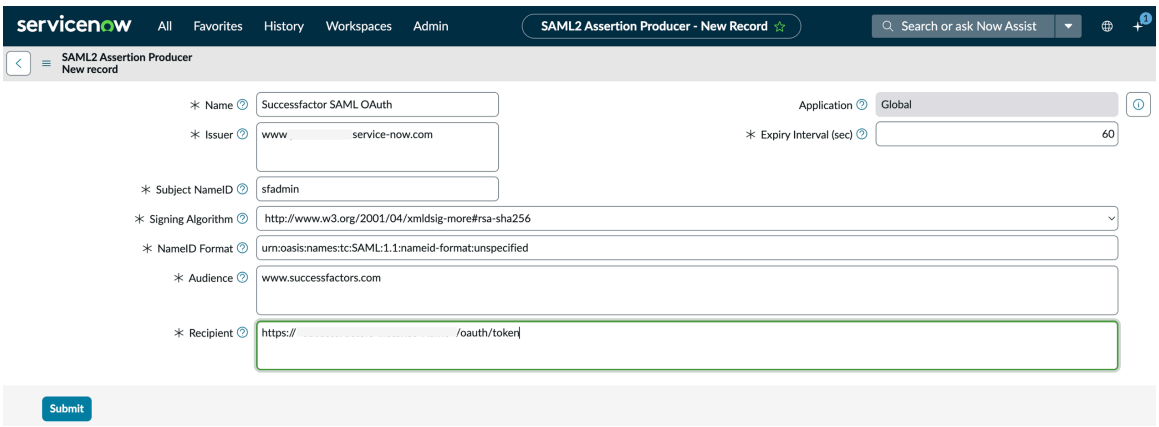
   b. Select **New**.

   c. On the form, fill these values.

Field	Description
Name	Unique name to identify the SAML2 assertion producer record. For example, `Successfactor SAML OAuth`.
Issuer	Unique identifier for the assertion issuing entity. Provide the ServiceNow instance URL.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Subject NameID	User name to log in to the SuccessFactors instance. For example, `sfadmin`.
Audience	Intended audience for the assertion. Enter the value, `www.successfactors.com`.
Recipient	Intended recipient for the assertion. Enter URL in this format, `https://<SuccessFactors-Instance-Name>/oauth/token`.



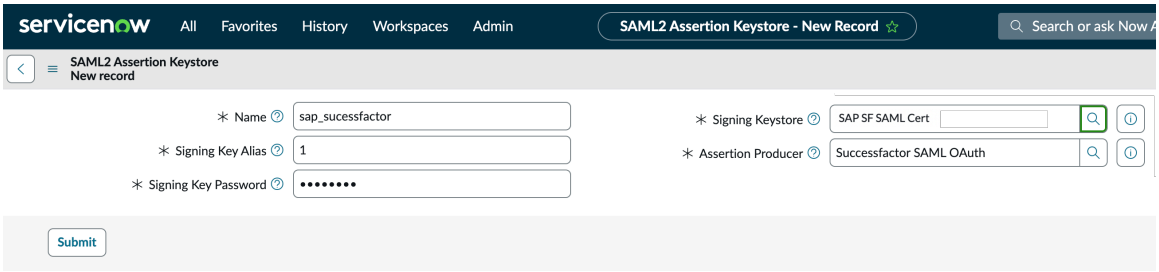
d. Select and hold (or right-click) the form header and select **Save**.

e. Under the **SAML2 Assertion Keystores** tab, select **New**.

f. On the form, fill these values.

Field	Description
Name	Unique name to identify the SAML2 assertion keystore record. For example, `successfactors`.
Signing Key Alias	Alias of key entry stored in the Keystore used to sign the assertion. For example, `successfactors`.
Signing Key Password	Password of the key entry stored in the keystore used to sign the assertion.
Signing Keystore	Required X.509 certificate record. Select the X.509 certificate record that you had earlier created. For more information, seeUpload the JKS certificate in your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



g. Select **Submit**.

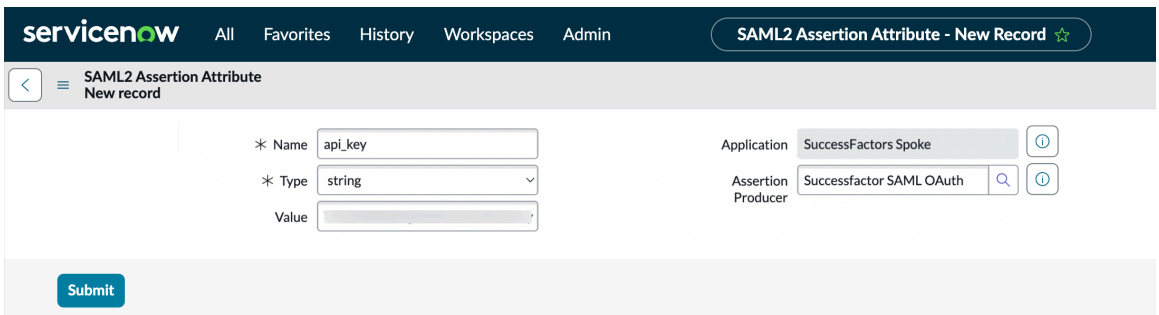
h. Navigate to **All** > **System OAuth** > **SAML2 Assertion Producers**.

i. Open the SAML2 assertion producer record that you had created.
For example, **Successfactor SAML OAuth**.

j. Under the **SAML2 Assertion Attributes** tab, select **New**.

k. On the form, fill these values.

Field	Description
Name	Name to identify the SAML2 assertion attribute record. Enter `api_key`.
Type	Type of the **Value** field. Select **String**.
Value	API key generated after the OAuth client application is created in SuccessFactors.



l. Select **Submit**.

2. Associate the SAML2 assertion producer with the application registry record.

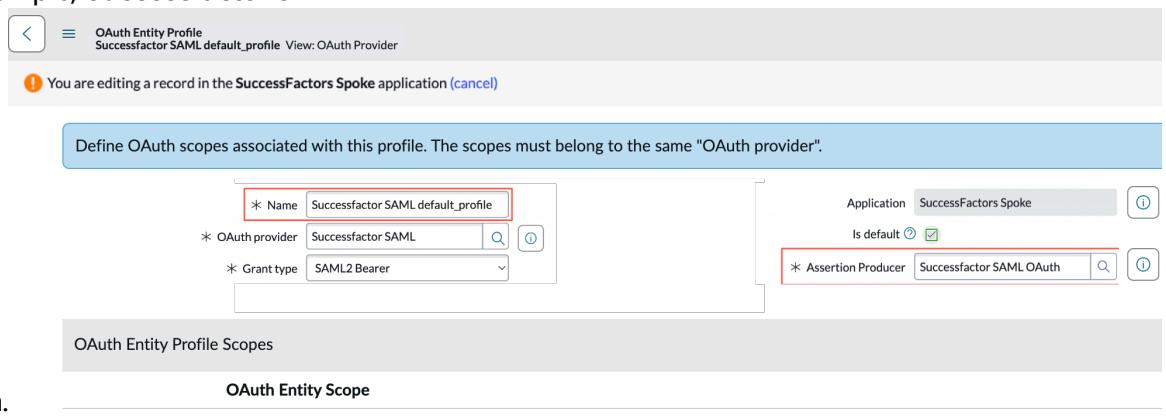
a. Navigate to **System OAuth** > **Application Registry**.

b. Open the application registry record that you had created.
For example, **SuccessFactors OAuth Reg**. For more information about creating the application registry, see Register SuccessFactors as an OAuth provider.

c. Under the **OAuth Entity Profiles** tab, open the default OAuth entity profile record.
For example, **Successfactor SAML default_profile**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

d. For the **Assertion Producer** field, select the SAML2 assertion producer record you had created.
For example, **Successfactor SAML**



OAuth.

e. Select **Update**.

Create credential record for the OData API

Create a connection record for the OData API in SuccessFactors. The SuccessFactors spoke connection and credential alias uses these connections to perform actions in SuccessFactors.

Before you begin

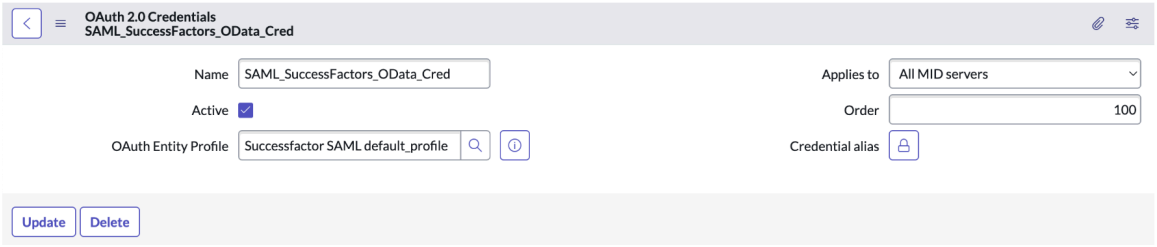
Role required: admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Credentials**.
2. Click **New**.
   The system displays the message **What type of Credentials would you like to create?**.
3. Select **OAuth 2.0 Credentials**.
   An empty OAuth 2.0 Credentials form is displayed.
4. On the form, fill these values.

Field	Value required
Name	Name to uniquely identify the record. For example, enter `SAML_SuccessFactors_OData_Cred`.
OAuth Entity Profile	OAuth entity profile record that is associated with the OAuth application registry you had created. For example, `Successfactor SAML default_profile`. For more information about creating the application registry, see Register SuccessFactors as an OAuth provider.
Active	Option to actively use the credential record.
Order	Order to apply this credential. For example, enter `100`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



5. Click **Submit**.

Result
The credential record to authorize actions using the OData API is created.

Create connection record for the OData API

Create a connection record for the OData API in SuccessFactors. The SuccessFactors spoke connection and credential alias uses these connections to perform actions in SuccessFactors.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
2. Open for the record for **SuccessFactors OData**.
   For example, **SuccessFactors_OData**.
3. From the **Connections** tab, click **New**.
   The system displays an empty HTTP(s) Connection form.
4. On the form, fill these values.

HTTP(s) Connection form

Field	Description
Name	Name to uniquely identify the record. For example, `SAML_SuccessFactors_OData_Conn`.
Credential	Credential record you created for the OData API. For example, `SAML_SuccessFactors_OData_Cred`.
Connection URL	SuccessFactors service root URL in this format: `https://<SuccessFactors_Instance_Name>/odata/v2`. For example, `https://apisalesdemo2.successfactors.eu/odata/v2`.
Active	Option to actively use the connection record.

5. Click **Submit**.

Result
The connection record for the OData API in SuccessFactors is created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create an SAP SuccessFactors integration profile

Create an SAP SuccessFactors integration profile to track software subscriptions and optimize licensing for your SAP SuccessFactors applications.

Before you begin

The Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) must be installed from the ServiceNow Store.

Change the application scope to **Global**.

ServiceNow Role required: sam_integrator

Important: You must select the **Software Asset Management integration with SuccessFactors** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the SuccessFactors integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **SuccessFactors Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **SuccessFactors** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Value
Display Name	Name of the integration profile. For example, `SuccessFactors Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Profile Type	Type of integration profile. This field is automatically set to `SuccessFactors Subscription`.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **SuccessFactors Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **SuccessFactors Update User Activity**.

      Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *`SAM - Refresh <displayname> Activity`* isn't created.

   c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **SuccessFactors Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_successfactors.SuccessFactors_OData**.

5. Generate and add the SAP SuccessFactors user login report to your integration profile.
   This report is required for retrieving the last activity date of your SAP SuccessFactors users. You must generate and add the latest version of this report every time you want to update the last activity date of your SAP SuccessFactors users in the Software Subscriptions [samp_sw_subscription] table.

   a. Log in to your SAP SuccessFactors instance using the admin credentials.

   b. On the page header of your instance, select **Home** > **Admin Center**.

   c. On the page header of the Admin Center, select **Reporting**.

   d. Select **New** to create a report.

   e. When prompted to select the type of report that you want to create, select **Report - Table** > **Select**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

f. Under **How would you like your data to be structured?**, select **Single Domain**.

g. Under **What data would you like to start with?**, select **Login Data**.

h. Click **Select**.
The Creating Login Data report page opens.

i. On the **General Info** tab, fill in the fields.

General Info tab

Field	Description
Domain	Domain from which you're retrieving data. This field is automatically set to **Login Data**.
Report Name	Name of the report.
Description	Description of the report.
Report Priority	Priority of the report.
Remove Styling	Deselect this check box.

j. On the **People** tab, select **Refine criteria**.

k. In the Define Team dialog box, fill in the fields.

Define Team dialog box

Field	Description
Team Manager	Manager of the team for which you want to create this report. Select **Logged In User**.
Team Reporting Type	Type of report that you want to create for the team. Select **Other Filters**. When you select this report type, you can define report scopes to filter the user groups that you want to include in the report. See step 14 for more details.
Include inactive users	Option to include all inactive team members in the report. Leave this option unselected.

l. Select **OK**.
The dialog box closes and you return to the **People** tab.

m. **Optional:** In the Define Report Scope section of the **People** tab, select the **Division**, **Department**, and **Location** report scopes to define filter criteria for the user groups that you want to include in the report.
By default, all filter criteria for these report scopes are enabled.

n. On the **Columns** tab, select **+ Select Columns** to specify the data columns that you want to include in the report.
You can sort, group, or rearrange the columns as needed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

o. Select the **Last Login** and **User Sys ID** check boxes so that the first column is Last Login and the second column is User Sys ID on the report.

p. **Optional:** On the **Configuration** tab, specify whether you want your data columns to display data in either the date only or the date and time format.
For each applicable data column, select either **Date** (date only) or **Timestamp** (date and time). After you select the format for each data column, select **OK**.

q. On the **Filters** tab, select filters to refine the data that is displayed on the report.

r. Select **Refine Criteria** > **Employee Login Detail** > **Last Login**.
A pop-up displays with the Define last login filter.

s. Select the **By Rule** > **Add rule** tab.

t. From the drop-down list, select the **Greater than** option.

u. Enter the date from when you want to generate the report.
You must select a date not older than a couple of weeks to keep the file size within allowed limits.

v. Select **Done** after you select the filters.

w. Select **Generate**.

x. In the Download section of the generated report, select **Excel** to export the report as an Excel file.

Note: The Excel file must not be greater than 5 MB.

y. Return to your SAP SuccessFactors integration profile form.

z. On the Integration Profile form header, select the Manage Attachments icon ( ).

aa. In the Attachments dialog box, select **Choose file** to locate and select your user login report.

ab. After the report uploads successfully, close the dialog box to return to the integration profile form.

6. After the form reloads, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

7. After the connection is verified, select **Publish**.
8. In the Publish Confirmation dialog box, select **OK**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

By default, the activity job runs every one hour and deletes the file attached to the integration profile as part of the clean-up. If the file isn't found, the activity job fails to indicate no new attachment. The job failure has no impact on the already updated last activity.

If you plan to attach the file once everyday or once a week, you can update the run time of the *SAM - Refresh Success Factors Activity* scheduled job accordingly. You can also run this job on demand whenever you attach a file.

You must attach a file every time for the job to run because SAP SuccessFactors doesn't have an API for activity data pull.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Important: Child aliases and alias overrides aren't supported for the **SuccessFactors Update User Activity** subflow because this subflow doesn't use REST steps directly where aliases are required.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Slack

Integrating your Software Asset Management application with the Slack application enables you to track your software subscriptions and reclaim unused licenses.

The ServiceNow Slack integration supports the Slack Enterprise Grid plan. This plan enables you to connect multiple workspaces across your organization.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Process	Required user role in the Slack application	Authentication scopes
Download subscriptions	Org Owner	admin
Pull user activity	Org Owner	admin
Reclaim subscription	Org Owner	admin

Create a Slack Enterprise Grid application

Create a Slack Enterprise Grid application to manage and connect multiple workspaces across your organization.

Before you begin

Role required: Refer to the Minimal user permissions table.

Procedure

1. From a web browser, open Slack.
2. Sign in using your Slack credentials.
3. Go to the Slack platform.
4. On the page header of the Slack platform, select **Your Apps**.
5. On the Your Apps page, select **Create New App**.
6. Select **From Scratch**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. In the Name app and choose workspace dialog box that opens, enter an application name in the **App Name** field.
8. From the **Pick a workspace to develop your app in:** list, select the workspace that you want the application to belong to.
9. Select **Create App**.
   The Slack platform creates the application and then redirects you to the Basic Information page. Use this page to view and configure application settings.
10. On the Basic Information page, copy the values in the **Client ID** and **Client Secret** fields and save them for later use.
11. Expand the Features section and then select **OAuth & Permissions**.
12. On the OAuth & Permissions page, configure the permissions that enable the interactions between the application and the Slack API.

    a. In the Redirect URLs section, add the URL of the OAuth provider that you want to redirect users to after authentication.

       i. Select **Add New Redirect URL**.

       ii. When prompted, enter `https://<instance-name>/oauth_redirect.do`, where <*instance-name*> is the name of your ServiceNow instance.

       iii. Select **Add**.

       iv. Select **Save URLs**.

    b. In the User Token Scopes section, add the admin OAuth scope to the application.

       The OAuth scopes limit the level of access that the application has to your users, channels, and workspaces. For more information on Slack OAuth scopes, see OAuth Permission scopes.

       i. Select **Add an OAuth Scope**.

       ii. When prompted, select **admin** from the OAuth Scope list.

       This OAuth scope enables the application to administer your workspace.

       Note: The **Description** field for the OAuth scope populates automatically.

13. Activate your application.
    a. From the side navigation pane, navigate to **Settings** > **Manage Distribution**.
    b. Under Share Your App with Other Workspaces, expand the Remove Hard Coded Information section.
    c. Verify that your application doesn't contain any hard-coded information, such as OAuth tokens.
    d. After verification, select the **I've reviewed and removed any hard-coded information** check box.
    e. Verify that you have completed all other sections.
    f. Select **Activate Public Distribution**.

Create a Slack workspace application

Create a Slack application on each workspace that you want to track user activity on.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: Refer to the Minimal user permissions table.

Procedure

1. From a web browser, open Slack.
2. Sign in using your Slack credentials.
3. Go to the Slack platform.
4. On the page header of the Slack platform, select **Your Apps**.
5. On the Your Apps page, select **Create New App**.
6. Select **From Scratch**.
7. In the Name app and choose workspace dialog box that opens, enter an application name in the **App Name** field.
8. From the **Pick a workspace to develop your app in:** list, select the workspace that you want the application to belong to.
9. Select **Create App**.
   The Slack platform creates the application and then redirects you to the Basic Information page. Use this page to view and configure application settings.
10. On the Basic Information page, copy the values in the **Client ID** and **Client Secret** fields and save them for later use.
11. Expand the Features section and then select **OAuth & Permissions**.
12. On the OAuth & Permissions page, configure the permissions that enable interactions between the application and the Slack API.

    a. In the Redirect URLs section, add the URL of the OAuth provider that you want to redirect users to after authentication.

       i. Select **Add New Redirect URL**.

       ii. When prompted, enter `https://<instance-name>/oauth_redirect.do`, where <*instance-name*> is the name of your ServiceNow instance.

       iii. Select **Add**.

       iv. Select **Save URLs**.

    b. In the User Token Scopes section, add the admin OAuth scope to the application.

       The OAuth scopes limit the level of access that the application has to your users, channels, and workspaces. For more information on Slack OAuth scopes, see OAuth Permission scopes.

       i. Select **Add an OAuth Scope**.

       ii. When prompted, select **admin** from the OAuth Scope list.

       This OAuth scope enables the application to administer your workspace.

       Note: The **Description** field for the OAuth scope populates automatically.

13. In the OAuth Tokens & Redirect URLs section of the OAuth & Permissions page, select **Install App to Workspace**.
14. Select **Allow**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Slack creates the application for the specified workspace.

15. Repeat steps 4 through 13 for each workspace on which you want to create an application.

Create a Slack integration profile

Create a Slack integration profile to track software subscriptions and optimize licensing for your Slack applications.

Before you begin

To create a Slack integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

Role required: sam_integrator

Important: You must select the **Slack Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Slack integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Slack Enterprise Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Slack Enterprise** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Value
Display Name	Name of the integration profile. For example, *`Slack Integration`*.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to `Draft`. ○ If you have already published the integration profile, this field is automatically set to `Published`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Profile Type	Type of integration profile. This field is automatically set to *`Slack Enterprise Subscription`*.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Slack Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Slack Update User Activity**.

      Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *`SAM - Refresh <displayname> Activity`* isn't created.

      In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

      Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

      You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

   c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Slack Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_slack_ah_v2.Slack_Enterprise**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in or verify the following fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create Connection and Credential dialog box

Field	Value
Name	Name of the Slack Enterprise Grid connection.
OAuth Client ID	Client ID that is assigned to your Slack Enterprise Grid application. Enter the same client ID that you copied in Create a Slack Enterprise Grid application.
OAuth Client Secret	Client secret that is assigned to your Slack Enterprise Grid application. Enter the same client secret that you copied in Create a Slack Enterprise Grid application.
OAuth Redirect URL	Redirect URL for your Slack Enterprise Grid application. This field populates automatically.

8. Select **Configure and Get OAuth Token**.

   Note: For the role required to perform this step, refer to the Minimal user permissions table.

9. On the Authorize App dialog box, verify if the Enterprise Grid workspace (Enterprise Organization) is available in the top corner drop-down list.
10. If the Enterprise Grid workspace is available, select the **Enterprise Grid workspace**.
    This action confirms that the token is fetched correctly, allowing the connection to validate successfully. For more information, refer to the knowledge base article KB2536373.
    A dialog box requests access at the Organization Level after you select the **Enterprise Grid workspace** (Enterprise Organization).
11. If the Enterprise Grid workspace isn't available,

    a. Select **Add another workspace**.

    b. Enter the Enterprise Grid workspace URL.

    c. Select **Continue**.
    You get redirected to the Authorize App dialog box.

    d. Select **Allow**.
    The OAuth access token becomes available for authorizing your Enterprise connection.

12. Create a connection between your Slack workspace and your ServiceNow instance to retrieve user data from your workspace.

    a. Open the connection & credential record set on the integration profile.

    b. Select the **Child Aliases** tab.

    c. Select **New**.

    Tip: If the **New** button isn't visible, change the scope to the Slack Spoke of the child alias by navigating to the **Application scope** and reloading the Connection & Credential Aliases page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

d. On the new child alias form that opens up, provide a name for the child alias.

e. Select **Submit**.

f. Open the child alias record that you created and select the **Create New Connection & Credential** related link.

g. In the Create Connection and Credential dialog box, fill in or verify the following fields.

Create Connection and Credential dialog box

Field	Value
Name	Name of the Slack workspace connection.
OAuth Client ID	Client ID that is assigned to your Slack workspace application. Enter the same client ID that you copied in Create a Slack workspace application.
OAuth Client Secret	Client secret that is assigned to your Slack workspace application. Enter the same client secret that you copied in Create a Slack workspace application.
OAuth Redirect URL	Redirect URL for your Slack workspace application. This field populates automatically.

h. Select **Configure and Get OAuth Token**.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

i. In the Authorize App dialog box, select **Allow**.
The OAuth access token becomes available for authorizing your Slack workspace connection.

j. Repeat steps a through i for each workspace connection that you want to connect.

13. Return to your ServiceNow instance to associate your Slack workspace connections with the instance.

a. Navigate to **Slack** > **Slack Workspace Tokens**.

b. Select **New**.

c. On the Slack Workspace Tokens form, fill in the fields.

Slack WorkspaceTokens form

Field	Description
Connection Alias	Name of your Slack workspace connection. Enter the same connection name that you entered in step g.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Workspace Name	The name of the workspace to which your Slack application belongs.
Slack App	Name of your Slack workspace application. Enter the same application name that you entered in Create a Slack workspace application.

d. Select **Submit**.

e. Repeat steps a through d for each workspace connection that you want to associate with your instance.

14. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

    Important: If you encounter configuration issues while validating the integration profile or retrieving subscriptions, refer to the knowledge base for troubleshooting guidance. For more information, see knowledge base article KB2536373.

15. After the connection is verified, select **Publish**.
16. In the dialog box, select **OK**.

    Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

    - The **Status** field on the integration profile form changes to **Draft**.
    - The **Validate connection** button shows up on the form.
    - The current *SAM - Refresh <displayname> Activity* job gets deleted.

17. **Optional:** To optimize memory and avoid performance issues in your Slack flow, you can turn off the flow engine reporting level.
    a. Navigate to **System Properties** > **All Properties**.
    b. Select the system property *com.snc.process_flow.reporting.level*.
    c. On the System Property page, set the **Value** to `OFF`.
    d. Select **Update**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with SmartRecruiters

Integrating your Software Asset Management application with the SmartRecruiters application enables you to track your software subscriptions and deactivate stale users. The reclamation flow deactivates only the users' access. The reclamation flow does not affect the subscription cost because SmartRecruiters is not priced based on the number of users.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Process	Required user role in the SmartRecruiters application	Authentication scopes
Download subscriptions	admin	None
Pull user activity	admin	None
Reclaim subscription	admin	None

Generate a SmartRecruiters API key

Generate an API key for authenticating SmartRecruiters API requests.

Before you begin

SmartRecruiters Role required: admin

Procedure

1. Log in to SmartRecruiters account by using your admin credentials to generate an API key.
2. On the page header of the SmartRecruiters portal, select your profile icon and then select **Settings/Admin**.
3. Under Company Settings, locate the Administration section and then select **Apps & Integrations**.
4. Select the **CREDENTIALS** tab and then select **NEW CREDENTIAL**.
5. When prompted to select the type of credential that you want to generate for your applications, select **API key**.
6. Select **Next**.
7. Enter a name for your API key in the **Credentials name** field.
8. Enter a description for your API key in the **Description** field.
9. Select **Generate**.
   SmartRecruiters automatically generates and displays your API key.
10. Copy your API key and save it in a secure location for later use.

Create a SmartRecruiters integration profile

Create a SmartRecruiters integration profile to track software subscriptions and usage. Identify users that no longer require access to SmartRecruiters and deactivate their access.

Before you begin

The Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) must be installed from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **SmartRecruiters Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the SmartRecruiters integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **SmartRecruiters Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **SmartRecruiters** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `SmartRecruiters Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **SmartRecruiters Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **SmartRecruiters Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **SmartRecruiters Update User Activity**.

Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **SmartRecruiters Reclaim Subscription**.

Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
Your ServiceNow instance creates a draft integration profile.

The **Connection & Credential** field appears and is automatically set to **sn_smartrec_spoke.SmartRecruiters**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection dialog box

Field	Description
Connection Information	
Connection Name	Name of the SmartRecruiters connection. This field populates automatically.
Connection URL	URL for the connection. This field is automatically set to `https://api.smartrecruiters.com`.
Credential Information	
API Key	API key for your SmartRecruiters applications. Enter the same API key that you generated in Generate a SmartRecruiters API key.

8. Select **Create**.
The dialog box closes and you automatically return to the integration profile form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

10. After the connection is verified, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

> **Note:** If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:
>
> - The **Status** field on the integration profile form changes to **Draft**.
> - The **Validate connection** button shows up on the form.
> - The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Smartsheet

Integrating your Software Asset Management application with the Smartsheet application enables you to track your software subscriptions and to reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Smartsheet application	Authentication scopes
Download subscriptions	admin	None
Pull user activity	admin	None
Reclaim subscription	admin	None

Create a Smartsheet API access token

Create an API access token for authenticating Smartsheet API requests.

Before you begin

Smartsheet Role required: admin

Procedure

1. From a web browser, open Smartsheet.
2. Log in using your Smartsheet credentials.
3. On the side navigation bar, select the account icon ( ) and then select **Apps & Integrations**.
4. In the Personal Settings dialog box, select **API Access**.
5. Under Manage API Access Tokens, select **Generate new access token**.
6. When prompted, enter a name for your API access token in the **API Access Token Name** field and then select **OK**.
   Smartsheet automatically generates and displays your API access token. For security purposes, this API access token appears only once.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. Copy your API access token and save it in a secure location for later use.
8. Select **OK**.

Create a Smartsheet integration profile

Create a Smartsheet integration profile to track software subscriptions and optimize licensing for your Smartsheet applications.

Before you begin

To create a Smartsheet integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Smartsheet Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

The Smartsheet integration supports two licensing models:

- Legacy subscription model: Subscriptions are classified as paid or free.
- User-based subscription model (USM): Subscriptions are classified by seat type. The following seat types are supported:
  - Member (paid)
  - Contributor (free)
  - Guest (free)
  - Provisional member (free)
  - Viewer (free)

After the first subscription data is pulled, the integration determines which licensing model is in use. If the API returns the seat type data, the integration uses the USM model. If no seat type data is returned, the integration uses the legacy subscription model.

If you're using Software Asset Workspace, the option to create the Smartsheet integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Smartsheet Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
	c. Select **Smartsheet** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `Smartsheet Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **Smartsheet Subscription**.

3. View the required user roles or API permissions to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Smartsheet Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

The Download Subscriptions subflow retrieves subscription data based on the licensing model in use:

- Legacy subscription model: Retrieves users classified as paid or free.
- USM: Retrieves users for each supported seat type by iterating through the seat type subscription identifiers. Only Member users consume paid entitlements. Contributor, Guest, Provisional member, and Viewer users are classified as free.

If the USM subscription identifiers aren't present in your instance, the integration falls back to the legacy model behavior. Subscription identifiers are updated automatically by a scheduled job. If you experience issues with subscription data, verify that the scheduled job has run successfully.

b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Smartsheet Update User Activity**.

The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *`SAM - Refresh <displayname> Events`* isn't created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: To enable detailed event tracking, procure an Event Reporting add-on from Smartsheet.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Smartsheet Reclaim Subscription**.

Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

The Reclaim Subscription subflow reclaims licenses based on the licensing model in use:

- Legacy subscription model: Removes the user from the Smartsheet organization account.
- USM: Downgrades the user from a paid Member seat to a free seat type instead of removing the user. This downgrade preserves the user's data and sheet access on the Smartsheet portal.

4. Select **Save** after completing all the required fields.
Your ServiceNow instance creates a draft integration profile. The integration profile uses the Smartsheet Download Subscriptions, Smartsheet Update User Activity, and Smartsheet Reclaim Subscription subflows to retrieve user data from the Smartsheet application.

   The **Connection & Credential** field appears and is automatically set to **sn_smrtsheet_spoke.Smartsheet**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Name	Name of the connection.
Connection URL	This field is automatically set to `https://api.smartsheet.com`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: Based on regions, replace the Connection URL with these respective URLs: ○ Smartsheet Gov: `https://api.smartsheetgov.com/` ○ Smartsheet Regions Europe: `https://api.smartsheet.eu/` ○ Smartsheet Regions Australia: `https://api.smartsheet.au/`
API Key	API key for your Smartsheet application. Enter an API key in the `api-access-token` format, where <*`api-access-token`*> is the API access token that you created in Smartsheet.

8. Select **Create**.
   You automatically return to the integration profile.
9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
10. After the connection is verified, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *`SAM - Refresh <displayname> Activity`* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with SurveyMonkey

Integrating your Software Asset Management application with SurveyMonkey application enables you to track your software subscriptions and to reclaim unused licenses.

The SaaS License Management SurveyMonkey integration supports the SurveyMonkey Enterprise and Enterprise Platinum plans as API support is available for only these plans.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the SurveyMonkey application	Authentication scopes
Download subscriptions	admin	• View Groups • View Users
Pull user activity	admin	View Groups

Create a private SurveyMonkey application

Create a private SurveyMonkey application for creating, tracking, and analyzing surveys within your organization.

Before you begin

SurveyMonkey Role required: Refer to the Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Note:

To avoid rate-limiting issues, create a private SurveyMonkey application for each ServiceNow instance.

Procedure

1. From a web browser, open the SurveyMonkey API Developer portal.
2. Sign in using your admin credentials.
3. On the page header of the API Developer portal, select **My Apps**.
4. On the My Apps page, select **Add a New App**.
5. In the APP CREATION dialog box, enter a name for the application in the **App Nickname** field.
6. Under the Select an App Type section, select **Private App**.
7. Select **Create App**.
   The dialog box closes and then the overview of the newly created application opens.
8. In the Details section of the application overview, copy the values in the **Client ID** and **Secret** fields.
   Save them in a secure location for later use.
9. Go to the application settings by selecting the **SETTINGS** tab.
10. In the Settings section of the application settings, enter the URL of the OAuth provider that users are redirected to after authentication in the **OAuth Redirect URL** field.
    Enter `https://instance.service-now.com/oauth_redirect.do`, where <*instance*> is the name of your ServiceNow instance.
11. Select **Submit Changes**.
12. In the Scopes section of the application settings, select the **View Groups** and **View Users** scopes to enable your application to access group and user information.
13. Select **Update Scopes**.
14. At the top of the application settings, select **Deploy**.

Create a SurveyMonkey integration profile

Create a SurveyMonkey integration profile to track software subscriptions and optimize licensing for your SurveyMonkey applications.

Before you begin

To create a SurveyMonkey integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **SurveyMonkey Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the SurveyMonkey integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **SurveyMonkey Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **SurveyMonkey** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `SurveyMonkey Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **SurveyMonkey Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **SurveyMonkey Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **SurveyMonkey Update User Activity**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

4. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_sv_monkey_spoke.surveyMonkey**.

5. Open the connection & credential aliases record by selecting the preview icon ⓘ next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Name	Name of the connection.
OAuth Client ID	Client ID that is assigned to your SurveyMonkey application.
OAuth Client Secret	Client secret that is assigned to your SurveyMonkey application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This field populates automatically based on the OAuth redirect URL that you specified in Create a private SurveyMonkey application.

8. Select **Create and Get OAuth Token**.

Note: For the role required to perform this step, refer to the Minimal user permissions table.

9. In the Authorize App dialog box, sign in using the same SurveyMonkey credentials that you used to create your SurveyMonkey application.
10. Select **Allow**.
    The dialog box closes and then you automatically return to the integration profile form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

11. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
12. After the connection is verified, select **Publish**.
13. In the Publish Confirmation dialog box, select **OK**.

Note: If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:

- The **Status** field on the integration profile form changes to **Draft**.
- The **Validate connection** button shows up on the form.
- The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Tableau Cloud

Integrating your Software Asset Management application with the Tableau Cloud application enables you to track your software subscriptions and to reclaim stale licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Tableau Cloud application	Authentication scopes
Download subscriptions	site administrator	None
Pull user activity	site administrator	None
Reclaim subscription	site administrator	None

Register a Tableau Cloud application

Register a Tableau Cloud application through the Tableau Cloud admin portal.

Before you begin

- Activate the Tableau spoke. For more information, see Tableau spoke.
- Tableau Cloud Role required: site administrator

Procedure

Use one of the following authentication types to validate ServiceNow instance requests with Tableau Cloud.

- Personal Access Token (PAT)
- JSON Web Token (JWT)

a. Validate ServiceNow instance requests with Tableau Cloud using the PAT authentication type.

i. Log in to the Tableau Cloud account using admin credentials.

ii. Select your profile icon.

iii. Select **My Account Settings**.

iv. Scroll down to the **Personal Access Tokens** section on your profile page.

v. In the text field, provide a token name.

For example, `Test 1`.

vi. Select **Create Token**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Personal Access Token is generated with a Token name and Secret.

vii. To copy the Personal Access Token Secret, select **Copy Secret**.

> **Important:**
>
> Keep the Personal Access Token Secret at a secure place. You would need it when you create a connection record for Tableau.

b. Validate ServiceNow instance requests with Tableau Cloud using the JWT authentication type.

i. Log in to the Tableau Cloud account using admin credentials.

ii. Select your profile icon.

iii. From the left-pane, select **Settings**.

iv. Select the **Connected Apps** tab.

v. On the Connected Apps page, select the **Direct Trust** option from the **New Connected Apps** drop-down list.

vi. In the **Create Connected App** dialog box, fill in the Connected app name, Access level, and Domain allow list details.

vii. Select **Create**.

The Connected App that you created gets displayed on the Connected Apps page. By default, the Connected App is inactive.

viii. To enable the Connected App, select the ellipsis icon ••• next to the Connected App name and then select **Enable**.

The status of the Connected App shows as enabled.

ix. Select the Connected App name.

Keep the Secret ID and Secret value at a secure place. You would need it when you create a connection record for Tableau.

x. To copy the Client ID, select **Copy Client ID**.

Keep the Client ID at a secure place. You would need it when you create a connection record for Tableau.

Create a Tableau Cloud integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Tableau Cloud service.

Before you begin

To create a Tableau Cloud integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

> **Important:** You must select the **Software Asset Management integration with Tableau** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

If you're using the Software Asset Workspace, the option to create the integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Tableau Cloud**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Tableau Cloud** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration profile form

Field	Value
Display name	Name of the integration profile. For example, `Tableau integration`.
Status	Status of the integration profile. ○ If you haven't published the integration profile, this field is automatically set to #**Draft**. ○ If you have already published the integration profile, this field is automatically set to#**Published**.
Profile type	Type of integration profile. This field is automatically set to Tableau Cloud Subscription.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Tableau Cloud Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Tableau Cloud Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   A draft integration profile is created.

   The **Connection & Credential** field appears and is automatically set to **sn_tableau_spoke.TableauCloud**.

5. Open the connection & credential aliases record by selecting the preview icon ( ) beside the **Connection & Credential** field.
6. Select **Open Record** in the record preview.
7. Select the **Create New Connection & Credential** related link.
8. On the form, fill in the fields.

Create Connection and Credential form

Field	Description
Please Enter the Connection Information	
Connection Name	Name of the connection. This field is automatically set to *Tableau Cloud* Connection.
Connection URL	The URL used for connecting to the server on which Tableau Cloud is installed. For example, `https://<server>.online.tableau.com/api/`.
Content URL	The permanent name of the site to sign in to. The content URL appears in the URL path of Tableau content in your browser address bar after the Tableau Server URL. mySite is the content URL in the following example: `http://<server or cloud URL>/#/site/mySite/explore`.
Please Enter the Credential Information Select the Personal Access Token (PAT) or JSON Web Token (JWT) authentication type. The fields change based on the authentication type that you select.	
Fields for the PAT authentication type	
Token Name	The Token name that you provided while registering the Tableau Cloud application by using the PAT authentication type.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	For more information, see Register a Tableau Cloud application.
Token Secret	The Token secret that you copied while registering the Tableau Cloud application by using the PAT authentication type. For more information, see Register a Tableau Cloud application.
Expiry Interval (sec)	Life span of the generated Personal Access Token (PAT). Default value: 14400 sec **Important:** You mustn't modify the value of this field.
Fields for the JWT authentication type	
Secret ID	The Secret ID that you copied while registering the Tableau Cloud application by using the JWT authentication type. For more information, see Register a Tableau Cloud application.
Secret Value	The Secret value that you copied while registering the Tableau Cloud application by using the JWT authentication type. For more information, see Register a Tableau Cloud application.
Username	User name, that is, email address of the authenticated Tableau Cloud user.
Client ID	The Client ID that you copied while registering the Tableau Cloud application by using the JWT authentication type.
Expiry Interval (sec)	Life span of the generated JSON Web Token (JWT). Default value: 3600 sec **Important:** You mustn't modify the value of this field.

9. Select **Create**.
10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

11. Select **Publish**.
12. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integrating with Trello

Integrating your Software Asset Management application with the Trello service enables you to track your software subscriptions and to reclaim unused licenses.

For more information about the Trello service, see the Trello Developer guide.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Trello application	Authentication scopes
Download subscriptions	Product admin	None
Pull user activity	Product admin	None
Reclaim subscription	Product admin	None

Generate Trello API key and token

Generate a Trello API key and token to get access to the Trello portal.

Before you begin

Trello Role required: Refer to the Minimal user permissions table.

Verify that you have a managed user account and Atlassian admin access.

Procedure

1. Go to Trello.
2. Log in as an enterprise admin.
3. Go to Developer API Keys.
4. Copy the API key from Personal Key on the Developer API keys page.
5. In the following link, replace {YourAPIKey} with the API key that you copied in the last step and open the link.
   `https://trello.com/1/authorize?expiration=never&scope=read,write,account&response_type=token&name=ServerTo`

   For example, if your API key is 123xyz, then open the following link- `https://trello.com/1/authorize?expiration=never&scope=read,write,account&response_type=token&name=ServerTo`

   The MyPersonalToken page appears and asks if you want to give access to your account.
6. Select **Allow**.
   An API token is generated. Copy this API token and store it securely.

Create a Trello integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Trello service.

Before you begin

To create a Trello integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ServiceNow Role required: sam_integrator and sn_trello_spoke.trello_admin

Important: You must select the **Trello Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Trello integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Trello Enterprise Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Trello Enterprise** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `Trello Integration`.
Status	Status of the integration profile. ○ If you haven't published the integration profile, this field is automatically set to #**Draft**. ○ If you've already published the integration profile, this field is automatically set to #**Published**.
Profile Type	This field is automatically set to **Trello Enterprise Subscription**.

3. Review the required user roles or API permissions to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Trello Download Subscriptions**.

> **Note:** The **Download subscriptions** check box is selected by default and you can't clear it.

b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Trello Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
A draft integration profile is created.

   The **Connection & Credential** field appears and is automatically set to **sn_trello_spoke.Trello_Alias**.

5. In the **Download Subscription Subflow** tab, select the preview icon ( ) next to the **Connection & Credential** field and then select **Open Record** in the record preview.
6. Select the **Create New Connection & Credential** related link.
7. On the form, fill in the fields.

Create Connection and Credential form

Field	Description
Connection Name	Name to identify the connection record.
Connection URL	Enter the URL as `https://api.trello.com/`.
API Key	The API key that you copied from the Trello portal.
API Token	The API token that you copied from the Trello portal.

8. Select **Create**.
9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.

10. Select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Workday

Integrating your Software Asset Management application with the Workday applications enables you to track your software subscriptions.

With this integration, you can track software subscriptions for the following Workday applications:

- Workday Human Capital Management
- Workday Financial Management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Use either of the following authentication methods to integrate your ServiceNow instance with Workday.

- Basic Authentication
- OAuth 2.0

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Workday application	Authentication scopes
Download subscriptions	User having the following Domain Security Policy: • Worker Data ○ Public Worker Reports ○ Workers ○ Current Staffing Information • Person Data: Work Address • Workday Accounts ○ WQL for Workday Extend ○ Workday Query Language	None

Integrate with Workday using Basic Authentication

Integrate your Software Asset Management application with the Workday application using Basic authentication method to track your software subscriptions.

Configure permissions in Workday

To set up the Workday integration successfully, perform this procedure in Workday.

Before you begin

Role required: Users having roles such as Security Admin, Integration Admin, Integration Auditor, who can create Integration System Users and assign required security policies.

Procedure

1. Register an Integration System User.

   Note: While filling out account information details, you must select the **Do Not Allow UI Sessions** check box.

2. Create a security group and assign it to the Integration System User.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In **Action**, navigate to **Security Group** > **Maintain Domain Permissions for Security Group** and provide the following permission:

Domain security policy permissions

Operation	Domain Security Policy	Functional Areas
Get Only	Worker Data: Public Worker Reports	Staffing
Get Only	Worker Data: Current Staffing Information	Staffing
Get Only	Worker Data: Workers	Staffing

Note: Confirm that the domain security policies are activated for the security group using the active pending security policy changes.

Result
The new credentials for this Integration System User would be used to configure the connection in the ServiceNow instance.

Create a Workday integration profile

Create a Workday integration profile to track software subscriptions and optimize licensing for your Workday applications.

Before you begin
Role required: admin, sam_admin, sam_integrator

Install the latest Workday HR spoke. For more information about the latest version, see the **Spoke version** section in Workday HR Spoke.

Important: You must select the **Software Asset Management integration with Workday** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task
If you're using Software Asset Workspace, the option to create the Workday integration profile in Core UI is inactive.

Procedure
1. Navigate to the integration profile.

Interface	Action
Core UI	a. Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. b. Select **New**. c. Select **Workday Integration Profile**.
Software Asset Workspace	a. Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. b. Select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
	c. Select **Workday** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Integration Profile	
Display name	Name of the integration profile. For example, `Workday integration`.
Authentication type	Type of authentication to access Workday APIs. ○ Basic Auth ○ OAuth 2.0
Status	Status of the integration profile. ○ If you haven't published the integration profile, this field is automatically set to #**Draft**. ○ If you've already published the integration profile, this field is automatically set to #**Published**.
Profile type	Type of integration profile. This field is automatically set to **Workday Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Workday Download Subscriptions**. The **Download subscriptions** check box is selected by default and you can't clear it.

4. Select **Save**.
The Connection Setup section is displayed on the integration profile.

Connection Setup section

Field	Description
Connection Details	○ If the connection details exist, this field is already populated. ○ If the connection details don't exist, you must create them.
SOAP Username	User name of the Integration system user created while configuring permissions in Workday.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Important: Include the tenant suffix in the username. For example, `username@<tenant>`.
SOAP Password	Password of the Integration system user created while configuring permissions in Workday.

5. If connection details don't exist, create the connection details.

Interface	Action
Core UI	In the **Connection Details** field, select the search icon ( ).
Software Asset Workspace	Select the **Connection details** link.

a. Select **New**.

b. On the form, fill in the fields.

Connection Details

Field	Description
Base URL	Workday SOAP API URL with the tenant name in the following format: `https://<workday_host_url>/ccx/service/<workday_tenant_name>`.
Version	The SOAP API version, for example, `v33.2`.
Webservice Type	Should be set to **SOAP**.

c. Select **Submit**.
A record is created and added in the **Connection Details** field.

d. **Optional:** Review the connection details by selecting the new integration profile and selecting the lookup icon in the **Connection details** field.

6. Create a SOAP user name and password when you don't have these credentials automatically populated.

Note: Only an admin role can create or update the SOAP user name and password.

Interface	Action
Core UI	a. Navigate to **All** > **System Web Services** > **SOAP Security Policies**. b. Select **All** in the top menu bar. c. Select **WorkdayHR**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Software Asset Workspace	Select the **SOAP username profile** link.

a. On the Soap Security Policy form, select the lookup icon in the **WS-Security Username Profile** field.

b. Select **New**.

c. On the WS-Security Username Profiles (Outbound) form, fill in the name, user name, and password for the integration profile.

d. Select **Submit**.

7. Select **Save**.
8. Under the **FSE worker calculation** tab, activate the worker categories covered by your contract by setting the value of **Active** to **true** and entering the FSE percentage.
9. **Optional:** If worker categories are listed in your contract but not available in the FSE worker calculation tab, add a new worker category.

a. In the **FSE worker calculation** tab, select **New**.

b. On the form, fill in the fields.

Workday FSE worker calculation

Field	Description
Worker Category	The worker category listed in your contract.
FSE Percentage	The FSE percentage for the worker category that you added. Full Service Equivalent (FSE) is the method by which the subscriptions are calculated.
Integration profile	The Workday integration profile that you created.
Active	Option to make the worker category active.

c. Select **Submit**.

10. Define the mapping of the newly created worker category.

a. Select the **Worker category** tab and select **New**.

b. On the form, fill in the fields:

Workday worker category

Field	Description
Worker Type	The type of worker, either Employee or Contingent.
Employee/Contingent worker type	The type of Employee or Contingent worker.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Time Type	Indicates whether the worker is full-time or part-time.
Worker Category	The worker category that you created.
Integration profile	The Workday integration profile that you created.
Active	Option to make the mapping active.

c. Select **Submit**.

11. Activate the list of modules that are defined in your contract.
    a. Select the **Modules** tab.
    b. Open the module record.
    c. Set the **Active** field to **True**.
    d. Select **Save**.
12. Verify that there is at least one active record in all the tabs for your contract: FSE worker calculation, Worker category, and Modules, before publishing the connection.
13. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
14. After the connection is verified, select **Publish**.
15. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrate with Workday using OAuth 2.0

Integrate your Software Asset Management application with the Workday application using OAuth 2.0 authentication method to track your software subscriptions.

Configure permissions in Workday

To set up the Workday integration successfully, configure permissions in Workday for the OAuth 2.0 authentication method.

Before you begin

Role required: Users having roles such as Security Admin, Integration Admin, Integration Auditor, who can create Integration System Users and assign required security policies.

Procedure

1. Register an Integration System User.

   Note: While filling out account information details, the **Do Not Allow UI Sessions** check box should be kept cleared to allow login and authentication.

2. Create a security group and assign it to the Integration System User.

   a. In **Action**, navigate to **Security Group** > **Maintain Domain Permissions for Security Group** and provide the following permission:

Domain security policy permissions

Operation	Domain Security Policy	Functional Areas
Get Only	Worker Data: Current Staffing Information	Staffing
View Only	Person Data: Work Address	Contact Information

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Domain Security Policy	Functional Areas
View Only	Worker Data: Active and Terminated Workers	Staffing
View Only	Workday Accounts	System
View and Modify	WQL for Workday Extend	System
View and Modify	Workday Query Language	System

Note: Confirm that the domain security policies are activated for the security group using the active pending security policy changes.

Result
The new credentials for this Integration System User would be used to configure the connection in the ServiceNow instance.

Create Workday OAuth 2.0 credentials

Create Workday OAuth 2.0 credentials to get access to Workday APIs.

Before you begin
Role required: Users having roles such as Security Admin, Integration Admin, Integration Auditor, who can create Integration System Users and assign required security policies.

Procedure
1. Log in to your Workday account.
2. In the search bar, enter `register API client` and select **Register API Client**.
3. On the Register API Client page, fill in the fields.

Register API Client fields

Field	Description
Client Name	A unique name for the client application. For example, `Workday HR spoke`.
Client Grant Type	Select **Authorization Code Grant**.
Access Token Type	The type of access token. Select **Bearer**.
Redirection URI	URL of your ServiceNow instance.
Non-Expiring Refresh tokens	The option to enable refresh tokens which do not expire.
Scope (Functional Areas)	Scopes required for the client application.
Include Workday Owned Scope	The option to select scopes that are owned by Workday.

4. Select **OK**.
   The client ID and client secret are generated on the Register API Client page.
5. Copy the values in the **Client ID** and **Client Secret** fields and secure them for later use for Workday integration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a Workday integration profile

Create a Workday integration profile to track software subscriptions and optimize licensing for your Workday applications.

Before you begin

Role required: admin, sam_admin, sam_integrator

Install the latest Workday HR spoke. For more information about the latest version, see the **Spoke version** section in Workday HR Spoke.

Important: You must select the **Software Asset Management integration with Workday** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Workday integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Workday Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Workday** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Integration Profile	
Display name	Name of the integration profile. For example, `Workday integration`.
Authentication type	Type of authentication to access Workday APIs. ○ Basic Auth ○ OAuth 2.0
Status	Status of the integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ If you haven't published the integration profile, this field is automatically set to #**Draft**. ○ If you've already published the integration profile, this field is automatically set to #**Published**.
Profile type	Type of integration profile. This field is automatically set to **Workday Subscription**.

3. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Workday Download Subscriptions**.

   Note: The **Download subscriptions** check box is selected by default and you can't clear it.

4. Select **Save**.
   A draft integration profile gets created.

   The **Connection & credential** field appears and is automatically set to **sn_workday_hr_spke.WorkdayHR**.

5. Open the connection & credential aliases record by selecting the preview icon (ⓘ) next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the dialog box, fill in the fields.

Create Connection and Credential dialog box

Field	Description
Connection Information	
Name	Name of the connection. For example, `Workday HR Connection`.
Connection URL	URL for the connection, `https://<workday_host>`. For example,`https://wd2-impl-services1.workday.com`.
Tenant name	Name of the Workday tenant.
API Version	Version of the Workday API to use for requests.
Credential Information	
Client ID	Client ID that you generated while creating a Workday OAuth credential. For more information, see Create Workday OAuth 2.0 credentials.
Client Secret	Client Secret that you retrieved while creating a Workday OAuth credential.
Authorization URL	URL used to authorize the OAuth connection. For example, `https://<auth-domain-name>.workday.com/<tenant>/authorize`
Token URL	URL used to generate the OAuth token. For example, `https://<domain-name>.workday.com/ccx/oauth2/<tenant>/token`
OAuth Redirect URL	`https://<instance_name>/oauth_redirect.do`, where the instance name is the name of your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. Select **Create and Get OAuth Token**.
   You're redirected to the Workday login page.
9. Log in to the Workday portal using the Integration System User credentials that you registered while configuring permissions in Workday.
   For more information, see Configure permissions in Workday.
10. In the Authorize Workday dialog box, select **Allow** to allow user permissions for Workday.
    The OAuth token is generated and you're redirected to your ServiceNow instance.
11. Under the **FSE worker calculation** tab, activate the worker categories covered by your contract by setting the value of **Active** to **true** and entering the FSE percentage.
12. **Optional:** If worker categories are listed in your contract but not available in the FSE worker calculation tab, add a new worker category.

    a. In the **FSE worker calculation** tab, select **New**.

    b. On the form, fill in the fields.

    Workday FSE worker calculation

Field	Description
Worker Category	The worker category listed in your contract.
FSE Percentage	The FSE percentage for the worker category that you added. Full Service Equivalent (FSE) is the method by which the subscriptions are calculated.
Integration profile	The Workday integration profile that you created.
Active	Option to make the worker category active.

    c. Select **Submit**.

13. Define the mapping of the newly created worker category.

    a. Select the **Worker category** tab and select **New**.

    b. On the form, fill in the fields:

    Workday worker category

Field	Description
Worker Type	The type of worker, either Employee or Contingent.
Employee/Contingent worker type	The type of Employee or Contingent worker.
Time Type	Indicates whether the worker is full-time or part-time.
Worker Category	The worker category that you created.
Integration profile	The Workday integration profile that you created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Active	Option to make the mapping active.

c. Select **Submit**.

14. Activate the list of modules that are defined in your contract.
    a. Select the **Modules** tab.
    b. Open the module record.
    c. Set the **Active** field to **True**.
    d. Select **Save**.
15. Verify that there is at least one active record in all the tabs for your contract: FSE worker calculation, Worker category, and Modules, before publishing the connection.
16. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
17. After the connection is verified, select **Publish**.
18. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Workplace from Facebook

Integrating your Software Asset Management application with the Workplace from Facebook application enables you to track your software subscriptions and reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Workplace from Facebook application	Authentication scopes
Download subscriptions	System admin	• Read group membership • Manage work profiles
Pull user activity	System admin	• Read group • Read group membership • Read group content • Read All messages • Read Knowledge Library content
Reclaim subscription	System admin	Provision User Accounts

Create a Workplace from Facebook integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Workplace from Facebook application.

Before you begin

To create a Workplace from Facebook integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ServiceNow Role required: sam_integrator

Important: You must select the **Workplace from Facebook Spoke** spoke check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

If you're using Software Asset Workspace, the option to create the Workplace from Facebook integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Workplace from Facebook Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Workpace from Facebook** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration profile form

Field	Value
Display name	Name of the integration profile. For example, Workplace from Facebook integration.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to #**Draft**. ○ If you have already published the integration profile, this field is automatically set to#**Published**.
Profile type	Type of integration profile. This field is automatically set to Workplace from Facebook Subscription.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information, see Minimal user permissions table.

   a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Workplace From Facebook Download Subscriptions**.

      Note: The **Download subscriptions** check box is selected by default and you can't clear it.

   b. In the Calculate Activity Subflow section, verify that the **Subflow** field is set to **Workplace From Facebook Update User Activity**.

      Note: The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *SAM - Refresh <displayname> Activity* isn't created.

      In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

      Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

      You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.

   c. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Workplace From Facebook Reclaim Subscription**.

      Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_fb_wp_spoke.FB_Workplace_Alias**.

5. Select the preview icon next to the **Connection & Credential** field and select **Open Record** in the record preview to open the connection & credential aliases record.
6. On the **Connection & Credential Aliases** form, select **FB_Workplace_Credentials** under the **Credential** column in the **Connections** list.
7. On the **Workplace from Facebook Credentials** form, select **Install on your Workplace**.

   You get redirected to theWorkplace sign-up/sign-in #page.

8. Log in to your#Workplace from Facebook account using your credentials.

   The **Add ServiceNow Spoke to Workplace** pop-up window gets displayed.

9. Select **Add to Workplace**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

10. Select **Done**.

    You are redirected back to your#ServiceNow #nstance and the relevant fields are updated.

11. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

12. After the connection is verified, select **Publish**.
13. In the Publish Confirmation dialog box, select **OK**.

> **Note:** If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections and then republish the integration profile because the following events occur:
>
> - The **Status** field on the integration profile form changes to **Draft**.
> - The **Validate connection** button shows up on the form.
> - The current *SAM - Refresh <displayname> Activity* job gets deleted.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Zendesk

Integrating your Software Asset Management application with the Zendesk application enables you to track your software subscriptions and to reclaim unused licenses.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Zendesk application	Authentication scopes
Download subscriptions	Light Agent	None
Pull user activity	Light Agent	None
Reclaim subscription	admin	None

Create a Zendesk OAuth client

Create an OAuth client for authenticating Zendesk API requests.

Before you begin

Zendesk Role required: admin

Procedure

1. From a web browser, open Zendesk.
2. Log in using your admin credentials.
3. On the left navigation menu of the Zendesk Agent Workspace, select the Admin icon ( ).
4. Go to the Admin Center from the Admin page and from the Admin menu, navigate to **Apps and Integrations** > **API**.
   The Zendesk API page opens.
5. Select the **OAuth Clients** tab and then select **Add OAuth client**.
6. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a new OAuth client form

Field	Description
Client name	Name of the OAuth client.
Description	Brief description of the OAuth client.
Company	Name of the company whose data the OAuth client grants access to through the Zendesk API. The company name is displayed during authentication of your Zendesk API requests. This field populates automatically based on the company that your Zendesk account is associated with. However, you can modify the company name as needed.
Logo	Logo that is displayed during authentication of your Zendesk API requests. Select the green square to locate and select the logo that you want to display.
Unique identifier	Unique identifier for the OAuth client. This field populates automatically based on the OAuth client name that you specified in the **Client name** field. However, you can modify the unique identifier as needed. **Note:** The unique identifier is used only in the Zendesk code.
Client kind	This field must be set to **Confidential**. Confidential authentication clients run on secure servers, where their credentials can be kept safe.
Redirect URLs	URL of the OAuth provider that users are redirected to after authentication. Enter `https://instance.service-now.com/oauth_redirect.do`, where <*instance*> is the name of your ServiceNow instance.

7. Select **Save**.
8. On the dialog box, select **OK**.
   The dialog box closes and the form reloads.
9. Copy the value from the **Secret** field.
   Save the Secret value in a secure location for later use.

Create a Zendesk integration profile

Create a Zendesk integration profile to track software subscriptions and optimize licensing for your Zendesk applications.

Before you begin

To create a Zendesk integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Zendesk Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

If you're using Software Asset Workspace, the option to create the Zendesk integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Zendesk Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Zendesk** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display Name	Name of the integration profile. For example, `Zendesk Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is automatically set to **Draft**. ○ If you have already published the integration profile, this field is automatically set to **Published**.
Profile Type	Type of integration profile. This field is automatically set to **Zendesk Subscription**.

3. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

a. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Zendesk Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Zendesk Reclaim Subscription**.

> **Note:** The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Save**.
Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_zendesk_spoke.Zendesk**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in the fields.

Create Connection dialog box

Field	Description
Connection Information	
Connection Name	Name of the Zendesk connection. This field populates automatically.
Connection URL	URL for the connection. Enter `https://<subdomain>.zendesk.com`, where <*subdomain*> is your organization subdomain.
Credential Information	
OAuth Client ID	Unique identifier for your Zendesk OAuth client. Enter the same unique identifier that you specified in Create a Zendesk OAuth client.
OAuth Client Secret	Secret that is assigned to your Zendesk OAuth client. Enter the same secret that you copied in Create a Zendesk OAuth client.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This field populates automatically based on the redirect URL that you specified in Create a Zendesk OAuth client.

8. Select **Create and Get OAuth Token**.

> **Note:** For the role required to perform this step, refer to the Minimal user permissions table.

9. On the Zendesk OAuth authorization dialog box, select **Authorize**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The OAuth access token becomes available for authorizing your Zendesk connection.

10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

    Validating the connection verifies the Download Subscriptions APIs, but not the Reclaim Subscriptions APIs.

11. After the connection is verified, select **Publish**.
12. In the Publish Confirmation dialog box, select **OK**.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Zoom

Integrating your Software Asset Management application with the Zoom Workplace application enables you to track your software subscriptions and to reclaim unused licenses.

A suite is a bundle of Zoom Workplace products and add-ons licensed together under a single subscription, rather than assigned to users individually. When a user is licensed through a suite, the Software Asset Management application tracks the suite subscription as a whole. When products or add-ons are assigned individually rather than through a suite, the Software Asset Management application tracks each one separately.

With this integration, you can retrieve and analyze licensing information for Zoom Workplace applications. These applications include the Zoom account (not a Master or Master-sub account) for Meetings and Webinar, along with the Workplace products and add-ons mentioned in the following table. Reclamation applies to all the following Zoom Workplace products and add-ons.

Supported Zoom Workplace products

Application	Type
Meetings	Product
Webinar	Product
Team Chat	Product
Mail & Calendar	Product
Phone	Product
Scheduler	Product
Docs	Product
Visitor Management	Product
Whiteboard Plus	Add-on
Clips Plus	Add-on
Webinars Plus	Add-on
Translated Captions	Add-on
Large Meeting	Add-on
Customer Managed Key	Add-on

Note: The enhanced Zoom Workplace offering is available starting from the Software Asset Management - SaaS License Management application version 18.1.1.

For additional information about Zoom, see Zoom Developer Documentation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Zoom application	Authentication scopes
Download subscriptions	View or edit user information (e.g. assigning licenses and groups to users): View	• user:read:list_users:admin • user:read:settings:admin
Pull user activity	View detailed usage reports for the account: View	• meeting:read:list_meetings:admin • webinar:read:list_webinars:admin
Reclaim subscription	View or edit user information (e.g. assigning licenses and groups to users): Edit	• user:update:settings:admin • user:update:user:admin • user:delete:user:admin

Create a Zoom Workplace application

Create an application in the Zoom App Marketplace.

Before you begin

Zoom Role required: Zoom for developers: Edit

Procedure

1. Navigate to Zoom App Marketplace and sign in to your account.
2. Select **Develop** > **Build App**.
3. In the **Select how the app is managed** section on the Basic Information page, select the **Admin-managed** option.
4. Select **Save**.
5. In the App Credentials section, obtain the Client ID and Client Secret.
   Copy and save these values in a secure location for later use.

   Note: Your Client ID and Client secret are sensitive. Don't share them.

6. Enter `https://instance.service-now.com/oauth_redirect.do` in the **OAuth Redirect URL** and **OAuth Allow Lists** fields, where *instance* is the name of your ServiceNow instance.
7. Select the **Scopes** tab on the left navigation menu.
8. Add the following scopes for enabling the integration to get a list of users, track meeting and webinar activity for users, and reclaim unused subscriptions.
   - user:read:list_users:admin
   - user:read:settings:admin
   - meeting:read:list_meetings:admin
   - webinar:read:list_webinars:admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- user:update:settings:admin
- user:update:user:admin
- user:delete:user:admin

Create a Zoom Workplace integration profile

Create an integration profile to track software subscriptions and optimize licensing for the Zoom Workplace service.

Before you begin

To create a Zoom Workplace integration profile, request and install the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

About this task

If you're using Software Asset Workspace, the option to create the Zoom Workplace integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**. **b.** Select **New**. **c.** Select **Zoom Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**. **b.** Select **New**. **c.** Select **Zoom Workplace** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `Zoom Workplace Integration`.
Status	Status of the integration profile. ○ If you have not published the integration profile, this field is set to#**Draft**. ○ If you have already published the integration profile, this field is set to#**Published**.
Profile type	Type of integration profile. This value is automatically set to *Zoom* `Workplace Subscription`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: ○ If you have an existing Zoom integration profile, the `Zoom Subscription` profile type will continue to work for the profile. For a new Zoom integration profile, select the `Zoom Workplace Subscription` profile type instead. ○ You existing `Zoom Subscription` profiles don't recognize the new Workplace products and add-ons. Create a `Zoom Workplace Subscription` profile to track these products and add-ons.

3. In the Process configuration section, review the required user roles or API permissions in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

   Note: For more information about the required roles and scopes, see the Minimal user permissions table.

   - The **Download subscriptions** check box is selected by default and you can't clear it.
   - The **Download Activity** check box is selected by default. If you clear it, the activity scheduled job *`SAM - Refresh <displayname> Events`* isn't created.

     In the **Analyze user activity** field, you can also select the date and time starting from when you want to analyze the user activity. By default, you can analyze user activity up to 60 days prior to the current date and view events performed by individual users from the time you create this profile.

     Note: Software Asset Management pulls the events from the time that you start analyzing user activity irrespective of the profile creation date.

     You can modify this value in the Last activity threshold field of your software reclamation rules. For more information, see Review a software reclamation rule.
   - The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Submit**.
   Your ServiceNow instance creates a draft integration profile.

   The **Connection & Credential** field appears and is automatically set to **sn_zoom_spoke.Zoom**.

5. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field and then selecting **Open Record** in the record preview.
6. On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.
7. In the Create Connection and Credential dialog box, fill in or verify the following fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create Connection and Credential dialog box

Field	Description
Connection Information	
Connection Name	Name of the Zoom Workplace connection. This field populates automatically.
Connection URL	URL for the connection. This field is automatically set to `https://zoom.us`.
Credential Information	
OAuth Client ID	Client ID for the OAuth 2.0 application created in step 5.
OAuth Client Secret	Password associated with the client ID created in step 5.
OAuth Redirect URL	`https://<instance_name>/oauth_redirect.do`, where instance name is the name of your ServiceNow instance.

8. Select **Configure and Get OAuth Token**.

   Note: For the role required to perform this step, see the Minimal user permissions table.

9. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.

   Validating the connection verifies the Download Subscriptions and Calculate Activity APIs, but not the Reclaim Subscriptions APIs.

   Note: If you clear the **Download Activity** check box after the integration profile is validated and scheduled jobs are created, you must revalidate the connections because the following events occur:

   - The **Status** field on the integration profile form changes to **Draft**.
   - The **Validate connection** button shows up on the form.
   - The current *SAM - Refresh <displayname> Events* job gets deleted.

10. After the connection is verified, select **Publish**.
11. In the Publish Confirmation dialog box, select **OK**.

Result

You can view events performed by individual users up to one year prior to the current date. For more information, see Review a software reclamation rule. Software Asset Management pulls the events from the time that you start downloading user subscriptions irrespective of the profile creation date.

What to do next

After the integration connects, your ServiceNow instance automatically creates software models, reclamation rules, and software subscriptions that are refreshed daily.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After creating an integration profile, view information about the profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **Direct integration profiles**. You can select an integration profile to view the following related lists. If all of the following related lists aren't visible for an integration profile in the default view, you can select the custom integration view from the Details tab:

- Software Models
- Unrecognized Subscription Identifiers
- Scheduled Jobs
- Scheduled Job Results
- Software Subscriptions
- Subscription Identifier Exclusion Rule
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

If you want to set up multiple integration profiles with unique connections, create child aliases to manage different configurations and settings for each integration profile. For more information, see Create a child alias to set up multiple integration profiles.

Review all automatically generated reclamation rules to reclaim user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track used software against owned software.

- For more information on creating software entitlements in the Software Asset Management Core UI, see Create entitlements in Software Asset Management classic.
- For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace.
- For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

- For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic.
- For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrate with SSO providers

Integrate with a Single Sign-On (SSO) provider to view software usage for all connected SSO applications.

Download a list of all your applications, users, and groups. Track user login data for all connected applications and reclaim unused licenses. Leverage usage data to forecast future licensing needs and cut back on unused licenses at renewal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integrating with Microsoft Entra ID

You can integrate your ServiceNow instance with Microsoft Entra ID to view software usage for all connected SSO applications.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Microsoft Entra ID application	Authentication scopes
• Download users • Download groups • Download group memberships	Application developer	• User.Read.All • GroupMember.Read.All • Application.Read.All
Download applications	Application developer	• User.Read.All • GroupMember.Read.All • Application.Read.All
• Connect applications • Update connected applications	• Global reader/Reports reader/ Security/ Administrator/Security operator/Security reader • Application developer	• AuditLog.Read.All • User.Read.All • GroupMember.Read.All • Application.Read.All
Reclaim subscriptions	User Administrator	User.ReadWrite.All

Create a Microsoft Entra ID application

Create an app in the Microsoft Entra ID portal to integrate with the ServiceNow AI Platform.

Before you begin

Microsoft Entra ID Role required: Refer to the Minimal users permission table.

Procedure

1. From the Azure portal, access Microsoft Entra ID.
2. Create a Microsoft Entra ID application.
   See Create a Microsoft Entra ID application for detailed instructions on registering and configuring an application.

   a. In the **Redirect URI** field, enter `https://<instance-name>.service-now.com/oauth_redirect.do`, where `<instance-name>` is the name of your ServiceNow instance.

   b. Record the application (client) ID and directory (tenant) ID to register the app as a third-party OAuth provider on your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Create a client secret and save the correct value (not the Client secret ID) to register the app as a third-party OAuth provider on your ServiceNow instance.

d. Add permissions to access the Microsoft Graph API.

Permission	Type
AuditLog.Read.All	Delegated or Application
User.Read.All	Delegated or Application
User.ReadWrite.All	Delegated or Application
GroupMember.Read.All	Delegated or Application
Application.Read.All	Delegated or Application

For more information, see Add permissions to access web APIs.

e. Grant admin consent to your application.
For more information, see Understanding API permissions and admin consent UI.

Create a Microsoft Entra ID integration profile

Create a Microsoft Entra ID integration profile in your ServiceNow instance.

Before you begin

To create a Microsoft Entra ID integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Microsoft Entra ID Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

Note: Starting with version 7.0.0 of Software Asset Management - SaaS License Management and version 3.1.0 of the Microsoft Entra ID spoke, your ServiceNow instance creates a separate Entra ID connection for each Microsoft Entra ID integration profile that you create. Each connection runs independently of each other, enabling your instance to support multiple independent Microsoft Entra ID integration profiles.

If you're using Software Asset Workspace, the option to create the Microsoft Entra ID integration profile in Core UI is inactive.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **SSO Integration Profiles**. **b.** Select **New**. **c.** Select **Microsoft Entra ID Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **SSO integration profiles**. **b.** Select **New**. **c.** Select **Microsoft Entra ID Integration Profile** from the drop-down list. **d.** Select **Continue**.

2. In the **Display name** field, enter a name for the integration profile.

   The remaining fields are automatically populated when you submit the form.

   Note: The SSO integration is created using a directory integration. The directory integration pulls SSO applications, users, and group data that are associated with your SSO integrations. For more information, see Viewing SSO subscription information.

   If you already have a Microsoft Entra ID directory integration, the SSO integration uses your existing directory integration. Otherwise, a Microsoft Entra ID directory integration is automatically created.

3. If you want to exclude the creation of SSO subscriptions for disabled accounts, select the **Exclude disabled accounts** option.
   The **Exclude disabled accounts** check box is clear by default. The disabled accounts are those accounts for which the Account status is disabled in the Entra ID portal.
4. In the Process configuration section, view the required user roles or API permissions to minimize security risks and optimize SaaS licenses.

   Note: For more information about the required roles and scopes, see Minimal user permissions table.

   - The **Download applications, users, and groups** check box is selected by default and you can't clear it.
   - The **Download Activity** check box is selected by default. If you clear it, the last activity for connected applications isn't pulled.
   - The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

5. Select **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The **Connection & Credential** field appears.

6. Select the **Create New Connection & Credential** related link.

   Note: If you have installed Software Asset Workspace, open the Connection and credential record and select the **Create New Connection & Credential** related link.

7. On the form, fill in the fields.

Create Connection and Credential form

Field	Value
Permission type	The type of permission for the integration profile to access data correctly and securely. Values include: ○ **Application Permissions**: Enable the application to access any data without a signed-in user. ○ **Delegated Permissions**: Enable the application to act in place of a signed-in user.
Auth URL	`https://login.microsoftonline.com/<directory-id>/oauth2/v2.0/authorize`, where `<directory-id>` is the directory (tenant) ID from the Azure portal.
Token URL	`https://login.microsoftonline.com/<directory-id>/oauth2/v2.0/token`, where `<directory-id>` is the directory (tenant) ID from the Azure portal.
Revoke token URL	`https://login.microsoftonline.com/<directory-id>/oauth2/v2.0/revoke`, where `<directory-id>` is the directory (tenant) ID from the Azure portal.
OAuth Client ID	Application (client) ID for the application you created in the Azure portal.
OAuth Client Secret	Client secret for the application you created in the Azure portal.
OAuth Redirect URL	`https://<instance-name>.service-now.com/oauth_redirect.do`, where `<instance-name>` is the name of your ServiceNow instance. This value is automatically populated.

8. Select **Create and Get OAuth Token**.
   You're redirected to the Azure portal. For the role required to perform this step, refer to the Minimal users permission table.
9. In the pop-up window, sign in to your account with Microsoft Entra ID admin credentials.
10. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
11. After the connection is verified, select **Publish**.
12. In the Publish Confirmation dialog box, select **OK**.
    If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections because the following events occur:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The **Validate connection** button shows up on the form.
- The last activity for users of the connected applications isn't pulled anymore.

Scheduled jobs and directory jobs download a list of all your applications, users, and groups. For more information, see Viewing SSO subscription information. View the status of your jobs in the Scheduled Job Results and Directory Job Results related lists of the integration profile. Software models are automatically created for applications with an **External Catalog ID** that matches an **Identifier** in the Subscription Product Definitions [samp_sw_subscription_product_definition] table.

Result

After you publish the integration profile and connect applications to the profile, you can view events performed by individual users up to 60 days prior to the current date. For more information, see Review a software reclamation rule.

Connect SSO apps

Connect a Single Sign-On (SSO) app to view all users and groups with access to the app. Track user login data and reclaim unused licenses.

Before you begin

Role required: sam_integrator

About this task

Note: For Microsoft Entra ID, the **Assignment required** toggle button on the application configuration page controls the access of the application by users.

- If the **Assignment required** toggle button is set to **Yes**, you must assign this application to the Microsoft Entra ID users and related applications and services. After you assign the application, Microsoft Entra ID users, associated applications, and services can access it.
- If the **Assignment required** toggle button is set to **No**, all users can log in to the application. The associated applications and services can also obtain an access token to this service.

SaaS License Management offers direct integrations with select applications. Direct integrations provide the most robust usage data. For a list of available direct integrations, see Integrate with SaaS applications. If you have a direct integration for an app, connecting the same app in an SSO integration creates duplicate subscription records in your ServiceNow instance. If you connect an SSO app and later decide to create a direct integration for that app, disconnect the app before creating a direct integration.

Note: If you're using Software Asset Workspace, the option to navigate to the SSO application in the Core UI is inactive.

Procedure

1. Navigate to the application.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **SaaS License** > **SSO Applications**.
Software Asset Workspace	Navigate to **License operations** > **User Subscriptions** > **SSO integration profiles**.

2. Select the application that you want to connect.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For Software Asset Workspace, select the **SSO Applications** tab.

3. If the **Software model** field is empty, add a software model for the app.
   An app must have a software model before you can connect it. Software models are automatically created for apps with an **External Catalog ID** that matches an **Identifier** in the Subscription Product Definitions [samp_sw_subscription_product_definition] table. For all other apps, you can create a software model manually. For more information, see Create software models in Software Asset Management classic.
4. **Optional:** Select the **Enable group based software model** check box for mapping an SSO group with a specific software model for the application.

   (Optional) For example, if an application has multiple license models that are linked to specific groups, then you can map a group to a software model to optimize license usage.

   Important: If you select this option, you must create a mapping for the SSO group before connecting the application. After the mapping is complete, the SSO subscriptions get automatically created or updated according to the mapped software model. For more information, see Create an SSO group software model mapping.

5. Select a date for the **Analyze last activity from** field.

   You can choose to start analyzing login data for individual users and applications from the current date or from up to 60 days in the past. The default value is 30 days. Choosing a past date enables you to detect stale subscriptions without waiting in real time because you can see subscriptions that haven't been used recently. Because choosing a date in the past increases the amount of data that is analyzed, it might take you longer to be able to view the results.

6. Select **Save**.
7. Select **Connect**.

   Tip: You can also connect multiple apps simultaneously from the **SSO Applications** list.

   In the Core UI interface, select the apps using the check box on the side of the list. At the bottom of the list, select the **Actions on selected rows** drop-down menu and then select **Connect**. If some apps don't have a software model, the **Connect** action shows that not all apps are connected. For example, **Connect (1 of 4)** shows that only 1 of the four apps you selected are connected. Add software models to connect the remaining apps.

Result

After the SSO application connects, your ServiceNow instance automatically creates users, groups, subscriptions, and reclamation rules that are refreshed daily.

- If the **Assignment required** toggle button is set to **Yes** for an application in the Microsoft Entra ID portal, the subscription is created only for users assigned to that specific application.
- If the **Assignment required** toggle button is set to **No** for an application in the Microsoft Entra ID portal, the subscription is created for all Microsoft Entra ID users.

What to do next

Review all automatically generated reclamation rules to meet your specifications for reclaiming user subscriptions. For more information, see Review a software reclamation rule.

After connecting the SSO application, view information about the SSO profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **SSO integration profiles**. You can select an integration profile to view the following related lists:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- SSO Applications
- Directory Users
- Scheduled Jobs
- Scheduled Job Results
- Directory Jobs
- Directory Job Results
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

Create software entitlements for the automatically generated software models to track used software against owned software. For more information on creating software entitlements in the Software Asset Management classic application, see Create entitlements in Software Asset Management classic. For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace. For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance. For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic. For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Integrating with Okta

You can integrate your ServiceNow instance with Okta to view software usage for all connected SSO applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Minimize security risks and protect information by granting access only to the necessary user or API permissions.

Minimal user permissions

Process	Required user role in the Okta application	Authentication scopes
Download users	Read-only administrator	okta.users.read
• Download groups • Download group memberships	Read-only administrator	okta.groups.read
Download applications	Read-only administrator	• okta.apps.read • okta.logs.read
Connect applications	Read-only administrator	okta.logs.read
Update connected applications	Read-only administrator	• okta.apps.read • okta.logs.read
Reclaim subscriptions	Application administrator	okta.apps.manage

You can also integrate with Okta using the Configuration Console for Software Asset Management. For more details about the Configuration Console, see Configuration Console for Software Asset Management.

Related topics

Configuration Console for Software Asset Management

Configuration Console overview

Configure Software Asset Management using the Configuration Console

Create an Okta application

Create an Okta application that you can integrate with the ServiceNow AI Platform.

Before you begin

Okta Role required: Refer the Minimal user permissions table.

See Administrator roles and permissions for more details on Okta admin roles and Scopes and supported endpoints for more details on Okta OAuth scopes.

Procedure

1. From a web browser, log in to the Okta administrator console.
2. Create an Okta application with OAuth 2.0 functionality.

   See Create an OAuth 2.0 app for Okta for detailed instructions.

   Keep the following points in mind when you're creating your Okta application:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- In the **Login redirect URI** and **Logout redirect URI** fields, enter `https://<instance-name>.service-now.com/oauth_redirect.do`, where *<instance-name>* is the name of your ServiceNow instance.
- Copy the values in the **Client ID** and **Client Secret** fields. Save them in a secure location for later use.
- Grant the following scopes to your Okta OAuth 2.0 application:
  - okta.groups.read
  - okta.apps.read
  - okta.users.read
  - okta.logs.read
  - okta.apps.manage
- Select the **Refresh Token** check box under the **Client acting on behalf of a user** Grant type on the Okta portal.

Create an Okta integration profile

Create an Okta integration profile in your ServiceNow instance.

Before you begin

To create an Okta integration profile, request the Software Asset Management - SaaS License Management plugin (sn_sam_saas_int) from the ServiceNow Store.

ServiceNow Role required: sam_integrator

Important: You must select the **Okta Spoke** check box for this integration while installing optional features on the Application Manager page. For more information about choosing the required SaaS applications, see Request SaaS License Management.

About this task

Note: Starting with version 7.0.0 of Software Asset Management - SaaS License Management and version 4.1.2 of the Okta spoke, your ServiceNow instance creates a separate Okta connection for each Okta integration profile that you create. Each connection runs independently of each other, which enables your instance to support multiple independent Okta integration profiles.

If you're using Software Asset Workspace, the option to create the Okta integration profile in Core UI is inactive.

Procedure

1. Navigate to the integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **Software Asset** > **SaaS License** > **SSO Integration Profiles**. **b.** Select **New**. **c.** Select **Okta Integration Profile**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **SSO integration profiles**. **b.** Select **New**. **c.** Select **Okta** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

SSO Integration Profile form

Field	Description
Display name	Name of the integration profile. For example, `Okta Integration`.
Status	Status of the integration profile. ○ If you haven't published the integration profile, this field is automatically set to **Draft**. ○ If you've already published the integration profile, this field is automatically set to **Published**.
Directory integration	A reference to the directory integration profile, which is used to pull the active directory users, groups, and group memberships of an organization. ○ If a directory integration record for Okta exists, you can select the existing record. ○ If a directory integration record for Okta doesn't exist, a new record is created when you save or submit this form.
Profile type	Type of the integration profile. This field is automatically set to **Okta**.
Connection & Credential	Reference to the connection and credential alias that is used in the directory and SSO integration. ○ If a directory integration record exists and you select it in the directory integration field, this field is automatically set to the connection and credential alias of the directory integration record. ○ If a directory integration value doesn't exist, this field is automatically populated.
Create Okta subscriptions	Option for creating a direct integration profile to view Okta subscriptions after this integration profile is published. Default value: False

3. In the Process configuration section, view the required user roles or API permissions to minimize security risks and optimize SaaS licenses.

Note: For more information about the required roles and scopes, see Minimal user permissions table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The **Download applications, users, and groups** check box is selected by default and you can't clear it.
- The **Download Activity** check box is selected by default. If you clear it,the last activity for connected applications isn't pulled.
- The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

4. Select **Submit**.
   The **Connection & Credential** field is automatically set to **sn_okta_spoke.<okta_profile_name>_apps_users_groups_activity_and_reclaim**.

   Note: The automatically populated value in the **Connection & credential** field changes based on the selection in the **Download activity** and **Reclaim subscriptions** check boxes.

   Automatically populated Connection & credential values based on the selection

Selection	Connection & credential value
Both **Download activity** and **Reclaim subscriptions** are selected.	sn_okta_spoke.<okta_profile_name>_apps_users_groups_ac
Only **Download activity** is selected.	sn_okta_spoke.<okta_profile_name>_apps_users_groups_ac
Only **Reclaim subscriptions** is selected.	sn_okta_spoke.<okta_profile_name>_apps_users_groups_ac
Both **Download activity** and **Reclaim subscriptions** aren't selected.	sn_okta_spoke.<okta_profile_name>_apps_users_groups_ac

5. Open the Create Connection and Credential dialog box.

Interface	Action
Core UI	Select the **Create New Connection & Credential** related link on the SSO integration profile form.
Software Asset Workspace	**a.** Selecting the preview icon ⓘ next to the **Connection & Credential** field **b.** Select **Open Record** in the record preview. **c.** On the Connection & Credential Aliases form, select the **Create New Connection & Credential** related link.

6. In the dialog box, fill in the fields.

   Create Connection and Credential dialog box

Field	Description
Name	Name of the connection. For example, `Okta Connection`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Connection URL	URL for the connection. Enter `https://<yourOktaDomain>.com`, where <*yourOktaDomain*> is your organization domain.
Authorization URL	URL of the OAuth authorization endpoint. Enter `https://<yourOktaDomain>.com/oauth2/v1/authorize`, where <*yourOktaDomain*> is your organization domain.
Token URL	URL of the OAuth endpoint that retrieves and refreshes access tokens. Enter `https://<yourOktaDomain>.com/oauth2/v1/token`, where <*yourOktaDomain*> is your organization domain.
Token Revocation URL	URL of the OAuth endpoint that revokes access tokens. Enter `https://<yourOktaDomain>.com/oauth2/v1/revoke`, where <*yourOktaDomain*> is your organization domain.
OAuth Client ID	Client ID that is assigned to your Okta application.
OAuth Client Secret	Client secret that is assigned to your Okta application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This field is automatically set to **https://<instance-name>.service-now.com/oauth_redirect.do**, where <*instance-name*> is the name of your ServiceNow instance.

7. Select **Create and Get OAuth Token**.

   Note: You must sign in using the same credentials as the user with the required role. For the role required to perform this step, refer to the Minimal user permissions table.

8. On the integration profile form, select **Validate Connection** to verify the connection and credential details of this integration.
9. After the connection is verified, select **Publish**.
10. In the Publish Confirmation dialog box, select **OK**.
    If you clear the **Download Activity** check box after the integration profile is published, you must revalidate the connections because the following events occur:
    - The **Validate connection** button shows up on the form.
    - The last activity for users of the connected applications isn't pulled anymore.

Result

Both scheduled jobs and directory jobs download a list of all applications, users, groups, and software subscriptions that are associated with your Okta application. View the status of your job in the **Scheduled Jobs Results** and **Directory Job Results** tabs of your integration profile. Software Asset Management automatically creates software models for applications with an external catalog ID that matches an **Identifier** in the Subscription Product Definitions [samp_sw_subscription_product-definition] table.

What to do next

If you've selected the **Create Okta subscriptions** check box and this integration profile is published, a direct integration profile for Okta gets created. You can navigate to the direct integration profile by selecting the **Direct integration profile** link in the information message.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After you've navigated to the direct integration profile, you can view Okta subscriptions by selecting the **Software Subscriptions** tab. For more information, see Okta SSO direct integration profile.

Warning:

When your OAuth token expires, your Okta integration profile displays an error message indicating that you must get a new OAuth token. Select the link in the error message to get the new OAuth token.

Don't delete the OAuth 2.0 credential record that is associated with the connection record for your Okta integration profile. If you delete the OAuth 2.0 credential record, you won't be able to get a new OAuth token after your current OAuth token expires.

After you publish the integration profile and connect applications to the profile, you can view events performed by individual users up to 60 days prior to the current date. For more information, see Review a software reclamation rule.

Okta SSO direct integration profile

Okta SSO direct integration profile helps you manage Okta user licenses by creating subscriptions for Okta users while setting up an Okta SSO integration.

OKTA SSO Direct Integration Profile

Field	Description
Display name	Name of the integration profile.
Status	Status of the integration profile. This field is automatically set to **Published**.
Profile type	Type of integration profile. This field is automatically set to **Okta Subscription**.
Download Subscription Subflow	
Subflow	This field is automatically set to **Okta Download Subscriptions**.

Connect SSO applications

Connect an SSO application to monitor all the users and groups who have access to that application. While SSO integration provides a summary of application usage and activity, direct integration offers detailed insights into these metrics.

Before you begin

ServiceNow Role required: sam_integrator

About this task

ServiceNow® SaaS License Management offers direct integrations with some applications. Direct integrations provide the most comprehensive usage data. For a list of available direct integrations, see Integrate with SaaS applications.

If you have already created a direct integration for an application, then connecting the same application in an SSO integration creates duplicate subscription records in your ServiceNow instance. You should only use the direct integration. If you connect an application in an SSO

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

integration, but you later want to create a direct integration for that application, then disconnect the application before creating the direct integration.

Procedure

1. Navigate to **All** > **SaaS License** > **SSO Applications**.
2. Select the application that you want to connect.
3. If the **Software model** field is empty, add a software model for the application.
   Before you can connect an application, it must be associated with a software model. ServiceNow® Software Asset Management automatically creates software models for applications with an external catalog ID that matches an **Identifier** in the Subscription Product Definitions [samp_sw_subscription_product_definition] table. For all other applications, you can create a software model manually. For detailed instructions, see Create software models in Software Asset Management classic.
4. **Optional:** Select the **Enable group based software model** check box for mapping an SSO group with a specific software model for the application.

   (Optional) For example, if an application has multiple license models that are linked to specific groups, then you can map a group to a software model to optimize license usage.

   Important: If you select this option, you must create a mapping for the SSO group before connecting the application. After the mapping is complete, the SSO subscriptions get automatically created or updated according to the mapped software model. For more information, see Create an SSO group software model mapping.

5. Select the date that you want to analyze the last activity from in the **Analyze last activity from** field.

   You can start analyzing login data for individual users and applications from the current date or from up to 60 days earlier. The default value is 30 days. If you select a date prior to the current date, it may take longer for results to appear due to the amount of data that you want to analyze.

   After you submit a value in the **Analyze last activity from** field, the field becomes read only.

6. Select **Connect**.

   Tip: To connect multiple applications simultaneously, select the check box for each application that you want to connect in the SSO Applications list. Select the Actions on the selected row menu and then select **Connect**. If any applications aren't associated with a software model, the name of the **Connect** menu item is updated to indicate that only some of the applications are connected. For example, a **Connect (1 of 4)** menu item indicates that only 1 of the four apps that you selected are connected. Add software models to the remaining applications to proceed with the connections.

What to do next

After the SSO application connects, your ServiceNow instance automatically creates users, groups, subscriptions, and reclamation rules that are refreshed daily. If you delete a user, application, group, or group membership from the Okta Developer Console, the changes are reflected on your ServiceNow instance.

Review all automatically generated reclamation rules to confirm that they meet your specifications for reclaiming user subscriptions. For more information, see Review a software reclamation rule.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After connecting the SSO application, view information about the SSO profile in the Software Asset Workspace by navigating to **License operations** > **User subscription** > **SSO integration profiles**. You can select an integration profile to view the following related lists.

- SSO Applications
- Directory Users
- Scheduled Jobs
- Scheduled Job Results
- Directory Jobs
- Directory Job Results
- Subscription User Exclusion Rule

After creating an integration profile, you can define subscription exclusion rules to keep certain subscriptions from license cost calculations. For more information, see Subscription exclusions for SaaS and SSO applications.

Create software entitlements for the automatically generated software models to track used software against owned software. For more information on creating software entitlements in the Software Asset Management classic application, see Create entitlements in Software Asset Management classic. For more information on creating software entitlements in the Software Asset Workspace, see Create entitlements in workspace. For more information on creating software entitlements using the Software Asset Management Playbook, see Create entitlements using the guided walk-through.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance. For more information on running reconciliation in the Software Asset Management classic application, see Run software reconciliation in Software Asset Management classic. For more information on running reconciliation in the Software Asset Workspace, see Run software reconciliation in the workspace.

Playbook for SaaS integrations

The SaaS playbook provides step-by-step guidance for integrating an SaaS application. It takes you in a phased way through each stage of the integration process, from initiation to completion.

The SaaS playbook includes multiple lanes that consist of:

- A list of tasks that you must perform within a lane
- Status indicators that display the current state of each task

Once you mark a task as complete, you move to the next task. You can save a task at any time and return to the playbook later.

Complete all the tasks in a lane to move to the next lane. As you keep completing tasks and lanes, the status gets reflected in the left-hand panel. Once you complete all the tasks, review the details you entered in all the lanes.

Related topics

Interact with Playbook

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a Salesforce CRM integration

Integrate your ServiceNow instance with the Salesforce customer relationship management (CRM) services to track your software subscriptions and to reclaim unused licenses by using the guided walk-through playbook.

Before you begin

Role required: Salesforce admin, sam_admin

- Create the Salesforce CRM integration only in the Global scope.

About this task

Note: The **Client Credentials** grant type is supported in Software Asset Management - SaaS License Management (sn_sam_saas_int) 16.1.0, Salesforce CRM application 2.0.2, and Salesforce CRM Spoke 2.4.0 version onwards.

Procedure

1. From your ServiceNow instance, navigate to **Software Asset Workspace** > **Software asset analytics**.
2. Select **Create direct integration**.
3. In the list of supported integrations, select **Salesforce CRM**.
4. Register the Salesforce application through the Salesforce admin portal.
   For more information, see Register a Salesforce application.
   a. Select **Register a Salesforce application** in the side pane.
   b. Complete the tasks in the Salesforce application.
   Select each check box as you complete each step.
   c. Select **Mark Complete**.
5. Create an integration profile to track software subscriptions and optimize licensing.
   a. Select **Profile details** in the left pane.
   b. On the form, fill in the fields,

Profile Details

Field	Description
Display name	Name of the integration profile to identify uniquely the organization for which you're creating the profile.
Status	Status of the integration profile. If you have not published the integration profile, this field is automatically set to **Draft**. If you have already published the integration profile, this field is automatically set to **Published**.
Profile type	Type of integration profile. This value is automatically set to Salesforce CRM.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Download subscription subflow	The value must be set to **Salesforce CRM Download Subscriptions**.
Reclaim subscription subflow	The value must be set to **Salesforce CRM Reclaim Subscription**.

c. Save your data.

- To save your data without continuing the integration, select **Save**.
- To save your data and continue the integration, select **Mark Complete**.

6. Create a connection and credential in the ServiceNow Classic interface.

a. Select **Connection and credential** in the left pane.

b. Open the connection & credential aliases record by selecting the preview icon ⓘ next to the **Connection & Credential** field.

c. Select **Continue**.

d. Select the **Create New Connection & Credential** link.

e. On the form, fill in the fields.

Create Connection and Credential

Field	Description
Connection information	
Connection Name	Name of the connection to identify uniquely the Salesforce organization for which you're creating this connection and credential.
Connection URL (Instance URL)	URL that displays after logging in to Salesforce, which is the custom domain URL of Salesforce.
Credential information	
Grant type	The grant type for your application according to your authentication needs. Possible values are: ▪ **Authorization Code** ▪ **Client Credentials**
OAuth Client ID	Client ID (consumer key) assigned to your Salesforce application.
OAuth Client Secret	Client secret (consumer secret) assigned to your Salesforce application.
OAuth Redirect URL	URL of the OAuth provider that users are redirected to after authentication. This is generally the URL of the ServiceNow instance that you specified while registering a Salesforce application in Step 4.

f. Select **Create and Get OAuth Token**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

g. In the OAuth2 authentication dialog box, log in to the same Salesforce admin account that you used to create your Salesforce application.

   If you have selected **Client Credentials** as the grant type, the OAuth2 dialog box doesn't appear.

   Your ServiceNow instance creates an OAuth token for Salesforce.

h. Select **Mark Complete**.

The integration profile uses the Salesforce CRM Download Subscriptions and Salesforce CRM Reclaim Subscription subflows to retrieve user data from your Salesforce CRM services.

7. **Optional:** Create a child alias and an extra integration profile.

   (Optional) The child alias uniquely identifies the connection and credentials for this additional integration profile.

   The first Salesforce CRM integration profile that you create uses the default (parent) connection and credential alias for Salesforce. Each additional Salesforce CRM integration profile that you create requires a unique child alias that helps differentiate the connection and credentials between each integration profile.

   Note: The application scope must be set to **Salesforce Spoke**.

   a. Select **Connect to additional Salesforce org (Optional)** in the left pane.

   b. Open the connection & credential aliases record by selecting the preview icon next to the **Connection & Credential** field.
   The display redirects to the ServiceNow Classic interface where you can configure the child alias.

   c. In the **Child Aliases** tab, select **New**.

   d. Enter a name for the child alias in the Connection and Credential Aliases form.

   e. Select **Submit**.
   After the form reloads, you can see the newly created child alias in the **Child Aliases** list.

   f. Select the **Create New Connection & Credential** related link to create multiple connections. Follow the same steps as for creating the parent connection.

   g. Select **Mark Complete** after you have completed the steps and select all the check boxes in the Playbook view.

8. Review the required fields before publishing the integration profile.

   a. Select **Review and Publish** in the left pane.

   b. Review the details of the integration profile.

   c. **Optional:** In the Connection & Credential field, select the preview icon to locate and select the child alias that you created in Step 7.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Selecting the child alias associates the additional integration profile with the child alias. Your ServiceNow instance uses this alias to identify the connection and credentials for this integration profile.

d. Review the required user roles or API permissions specified in the **Vendor configuration** field for each process to minimize security risks and optimize SaaS licenses.

Note: For more information, see Minimal user permissions table.

i. In the Download Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce CRM Download Subscriptions**.

Note: The **Download subscriptions** check box is selected by default and you can't clear it.

ii. In the Reclaim Subscription Subflow section, verify that the **Subflow** field is set to **Salesforce CRM Reclaim Subscription**.

Note: The **Reclaim subscriptions** check box is selected by default. If you don't want to reclaim subscriptions, you can clear this check box. If you clear it, the removal candidates are created but the reclaim subscription subflow isn't triggered or the reclamation process isn't initiated.

e. Select **Save**.

f. Select **Validate Connection**.

9. Select **Publish** to publish the integration profile.
10. **Optional:** Verify whether the status of all scheduled job results is complete.

Result
After the integration is published successfully, you're redirected to the record page. You can view the details of the integration profile, associated software models, triggered scheduled jobs, scheduled job results, and unrecognized subscription identifier.

SaaS License Connections

Creating a custom integration helps you connect the Software Asset Management application with a SaaS application that doesn't have an existing integration in SaaS License Management.

The low-code framework uses ServiceNow® Integration Hub and ServiceNow® Flow Designer to connect with a SaaS provider's API endpoints. You can perform the following actions:

- Download a list of all users, view meaningful usage data, and optimize your SaaS spend by reclaiming unused subscriptions.
- Manage your custom SaaS connections along with the base system SaaS connections using Software Asset Management software models and reporting.

Custom integrations

Install Integration Hub Starter, Standard, Professional, or Enterprise to create a custom integration. For more information about Integration Hub, see Request IntegrationHub.

There's no charge to install Integration Hub plugins on a non-production instance. You can build a custom integration on a non-production instance that has Integration Hub installed, then bring it into your production environment using an update set. For more information about update sets,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

see System update sets. This way, you can validate your custom integrations before putting them in production and you're not charged for an Integration Hub subscription.

Important: You can create custom integrations for subscription-based models using User Subscription as the license metric, and for consumption-based models using SaaS Consumption as the license metric.

Some SaaS applications have existing Integration Hub spokes that you can use to create your custom integration. If there's an existing spoke for the SaaS application that you're integrating with, skip the step to create a custom spoke. If you use an existing spoke, you can use some of its data stream actions. Find out what actions are included with the spoke before creating your own actions. For a list of applications that have Integration Hub spokes, see IntegrationHub available spokes.

Building a custom integration with SaaS License Connections requires you to track many different values. Use the SaaS License Connections Worksheet while researching the SaaS API and building your data stream actions to make sure that you have all the information you need.

Create a custom spoke

To set up a custom integration in SaaS License Management, create a spoke to connect with a SaaS application.

Before you begin

Role required: admin

About this task

- Use ServiceNow® Studio to create a spoke. For more information about Studio, see ServiceNow Studio.
- If a spoke exists for the SaaS application that you're integrating with, you can use the existing spoke instead of creating one. For a list of applications that have ServiceNow® Integration Hub spokes, see IntegrationHub available spokes.

Procedure

1. Navigate to **All** > **System Applications** > **Studio**.
2. Select **Create Application**.
3. Give your app a name that includes the name of the SaaS application that you're integrating with and a description.
   Keep the auto-filled value for the **Scope** field.
4. Select **Create**.
5. Add the following roles and then select **Continue**.
   - `admin`
   - `sam_developer`
   - `delegated_developer`
6. Select the Classic format, then select **Continue**.
7. Select **Done with tables**.
8. To close the session and create your app, select **X**.

Tip: Refresh the page to view the spoke app that you created in the list of apps.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next
As you continue building your custom integration, use the spoke to save the following items.

- Connection & Credential alias
- Data stream actions to get users and user activity
- Action to reclaim a user

If you're publishing your custom spoke application on the ServiceNow Store, also use the spoke to save your subflows.

Create a custom integration profile to track software subscriptions and optimize stale licenses for any SaaS application. For more information, see Create a custom integration profile.

Create a custom integration profile

Create a custom integration profile to track software subscriptions and optimize stale licenses for any SaaS application.

Before you begin
Before you create a custom integration profile in your ServiceNow instance, set up a method of authentication in the SaaS application admin or developer account. For example, create an OAuth application or an API token.

- If you create an OAuth application, confirm that you enable the appropriate scopes. The app needs scopes to read users, read user activity, and to modify or delete users. These scopes enable the integration to get a list of users, get user activity, and reclaim unused subscriptions. Record the Client ID and Client secret for the OAuth application. You input these values in your ServiceNow instance.
- If you create an API token, record the value for the API token. You input this value in your ServiceNow instance.

Role required: sam_integrator

About this task
If you're using Software Asset Workspace, the option to create the custom integration profile in the Core UI is inactive.

Procedure
1. Navigate to the custom integration profile.

Interface	Action
Core UI	**a.** Navigate to **All** > **SaaS License** > **Administration** > **Create New Profile**. **b.** Select **Custom Integration Profile**.
Software Asset Workspace	**a.** Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles** > . **b.** Select **New**. **c.** Select **Custom** from the drop-down list. **d.** Select **Continue**.

2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Custom Integration Profile form

Field	Value
Display name	Name of the custom integration profile. For example, the name of the SaaS application that you're integrating with.
Connection & Credential	**a.** Select the lookup icon ( ). **b.** Select **New**. **c.** On the Connection and Credential Aliases form, fill in the fields: ▪ Name: Name of your choice. For example, *app*_alias, where *app* is the name of the SaaS application that you're integrating with. ▪ Application: Spoke for connecting with the SaaS application. This spoke can be an existing Integration Hub spoke or a new spoke that you created. You can change the application in the Developer section of the System Settings . ▪ Type: **Connection and Credential**. ▪ Connection Type: **HTTP**. ▪ Support Multiple Active Connections: Not selected. ▪ Default Retry Policy: **Default HTTP Retry Policy**. ▪ Configuration Template: If you're using the OAuth authorization code grant type, **OAuth Authorization Code**. If you're using an API token, **Basic Auth with API Key**. If you're using another authentication method, create a configuration template. For more information, see Create a configuration template and Configure a template for OAuth JWT Bearer grant type . **d.** Select **Submit**.
Status	Status of the integration profile. The options are **Draft** and **Published**. This value is automatically populated.
Profile type	Custom Integration. This value is automatically populated.

3. Select **Save**.
4. Open the Connection & Credential alias record by selecting the preview icon and then selecting **Open Record**.
5. Select the **Create New Connection & Credential** related link.
   - If you're using the OAuth Authorization Code configuration template, fill in the fields.

Create Connection and Credential form

Field	Value
Connection URL	Base URL for the API.
Authorization URL	OAuth authorization code endpoint.
Token URL	OAuth endpoint to retrieve and refresh access tokens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Token Revocation URL	OAuth endpoint to revoke access tokens.
OAuth Redirect URL	`https://instance.service-now.com/oauth_redirect.do`, where *instance* is the name of your ServiceNow instance.
Refresh Token Lifespan	**8640000**.
OAuth Client ID	Client ID that you created in the SaaS application admin or developer account.
OAuth Client Secret	Client secret that you created in the SaaS application admin or developer account.
OAuth Scopes	Scopes that you enabled for your OAuth application in the SaaS application admin or developer account.

- If you're using the Basic Auth with API Key configuration template, fill in the fields.

  Create Connection and Credential form

Field	Value
Connection URL	URL for your SaaS account.
User Name	Email address of the admin user that created the API token in the SaaS application admin or developer account.
API Key	API token created in the SaaS application admin or developer account.

- If you're using a different method of authentication, the available fields are determined by the configuration template that you created.

6. Select **Create** and grant access for the integration.

   Tip: Log in to your SaaS application admin account in a new browser tab to verify that the integration connects to the correct account.

   - If the connection is successful, a connection record is created in the Connections related list on the Connection & Credential Alias record.
   - If the connection fails, you must delete the connection record, credential record, and application registry record that were created during the attempted connection.
     a. To delete the connection record, navigate to **Connections & Credentials** > **Connections** and delete the record for the SaaS application.
     b. To delete the credential record, navigate to **Connections & Credentials** > **Credentials** and delete the record for the SaaS application.
     c. To delete the application registry record, navigate to **System OAuth** > **Application Registry** and delete the record for the SaaS application.
     d. Return to the Connection & Credential Alias record for the SaaS application and select the **Create New Connection & Credential** related link to reattempt the connection.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

Create a data stream action to get users and view SaaS related analytics on SaaS overview dashboard.

Reconciliation also runs on your subscriptions as a scheduled job or on-demand. You can view your reconciliation results in the License Workbench (Software Asset Management classic application) or the License usage view (Software Asset Workspace). Use these results to determine your license compliance position and to remediate any non-compliance.

Create a data stream action to get users

Create a data stream action to get a list of user subscriptions from the SaaS application.

Before you begin

If you're using an existing ServiceNow® Integration Hub spoke, find out if it has a data stream action to get a list of users that you can use instead of creating one. For more information about data stream actions, see Data Stream actions.

Role required: flow_designer

Procedure

1. Navigate to **All** > **Flow Designer** > **Designer**.
2. Select **New**.
3. Select **Data Stream**.
4. On the form, fill in the fields.

Action Properties form

Field	Value
Name	Name of your choice. For example, `Get Users`.
Accessible From	**All application scopes**.
Category	Leave this field empty.
Protection	**None**.
Application	Spoke app to integrate with the SaaS application. This spoke app can be an existing Integration Hub spoke or a new spoke that you created.
In-Flow Annotation	Leave this field empty.
Description	Description of your choice.

5. Select **Submit**.
6. If the API that you're working with requires user authentication for requests, select **Inputs** in the Action Outline and add inputs for authentication.
   Examples of common user authentication inputs are `admin user id` and `site name`.
   See the documentation for your chosen API to learn about the requirements for user authentication in your specific case. If the API requires an access token, a *`Credential`*

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Value variable is automatically created later. You don't need to add an access token as an input.

When you use your completed data stream action in a subflow, you define what values to pass as these inputs.

7. Select **Request** in the Action Outline.
8. On the form, fill in the fields.

Request form

Field	Value
How will you get data	Choose either **REST Step** or **SOAP step**. Your choice depends on the API for the SaaS application that you're integrating with.
Enable pagination	Selected.
Run a script before each request	Not selected.

9. Select **Pagination Setup step** in the Action Outline.
10. Define pagination variables based on the query parameters used by the SaaS API.

    If you're using offset-based pagination, use the Limit/Offset pagination template to preload the pagination configuration.

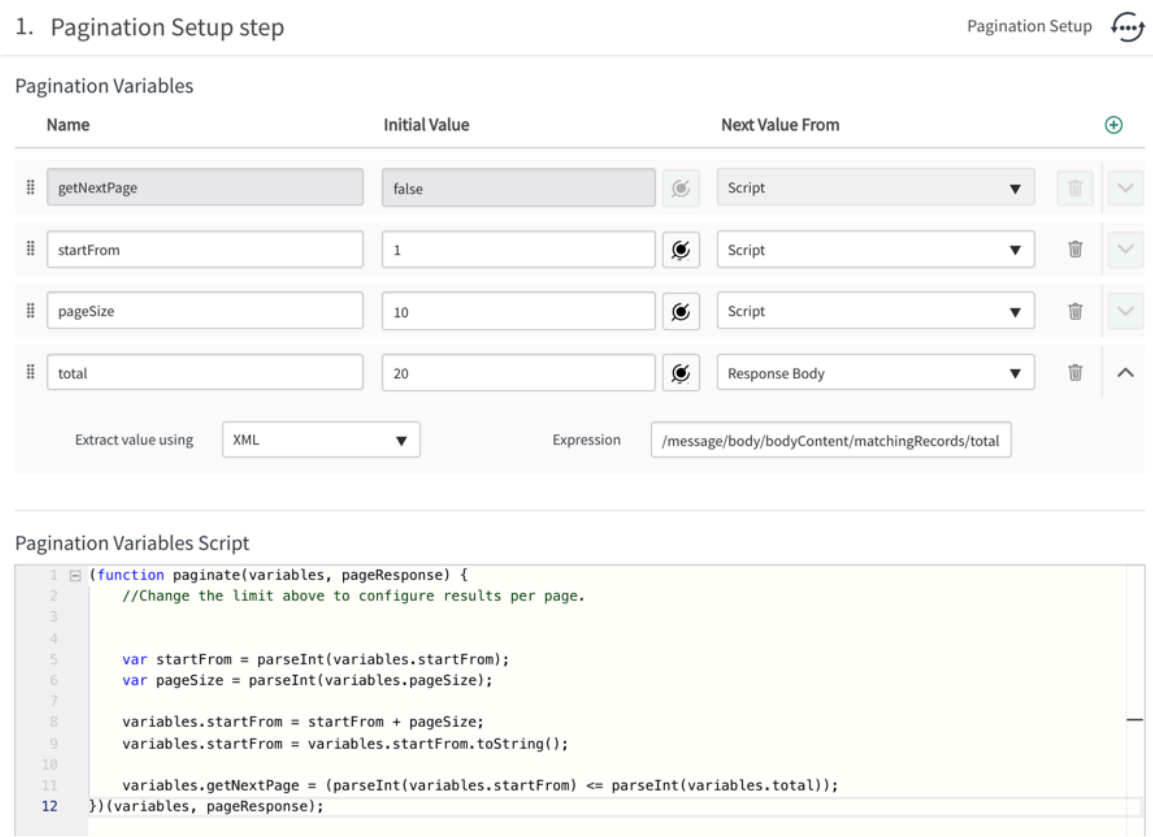
    Note: The value of the reserved `getNextPage` variable determines whether to request another page of results. As long as the `getNextPage` variable is **true**, the action continues to send requests for the next page.

11. Write a `Pagination Variables` script to update the pagination variables.

    The script runs on each request. If you're using a pagination template, adjust the preloaded script as needed.

    The following image shows an example of the pagination setup step completion. This example is from the Get Users data stream action used in the Webex Download Subscriptions subflow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Note: Pagination variables only support the string data type. To perform math operations, you must convert the value to an integer, perform any required operations, then convert it back to a string.

12. Select **SOAP step** or **REST step** in the Action Outline to receive data.
    - If you selected **SOAP step**, fill in the details.

SOAP step form

Field	Value
Connection Details	
Connection	**Use Connection Alias**.
Connection Alias	Connection alias that you created when you created the integration profile. If you have not yet created an integration profile, follow the steps to create a custom integration profile with a connection alias.
Endpoint	This value is automatically populated when you select the connection alias. This value is set to the Connection URL from the HTTPs Connection record linked to the alias.
Request Details	
Build Envelope	**Manually**.
SOAP Action	API request to get a list of all users. See the documentation for your chosen API to select the appropriate request.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
SOAP Envelope	XML request message to get a list of all users. See the documentation for your chosen API to learn how to write an XML request message. In general, the header should have your input variables for user authentication as well as the *Credential Value* variable as the access token. The body should include the request to get a list of all users and your variables from the pagination setup step. **Note:** For an example of a SOAP envelope, see the Get Users data stream action used in the Webex Download Subscriptions subflow.

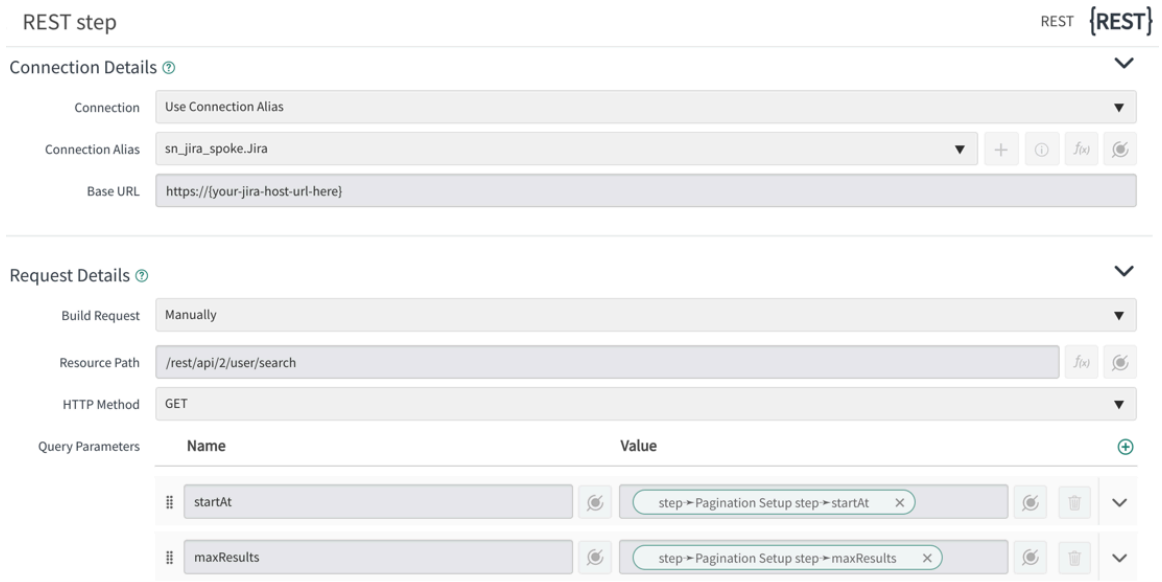
- If you selected **REST step**, fill in the details.

REST step form

Field	Value
Connection Details	
Connection	**Use Connection Alias**.
Connection Alias	Connection alias that you created when you created the integration profile. If you have not yet created an integration profile, follow the steps to create a custom integration profile with a connection alias.
Base URL	This value is automatically populated when you select the connection alias. It's set to the Connection URL from the HTTP(s) Connection record linked to the alias.
Request Details	
Build Request	**Manually**.
Resource Path	Path to the resource. This value gets appended to the Base URL. See the documentation for the API that you're working with to learn how to construct the resource path.
HTTP Method	**GET**.
Query Parameters	Add parameters for pagination. Set the values as the variables that you created in the pagination setup step.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The following image shows a completed example of the REST step. This example is from the Get Jira Users data stream action used in the Jira Download Subscriptions subflow.



13. Select **Parsing** in the Action Outline.
14. On the form, fill in the fields.

Parsing form

Field	Value
How will you identify each record	**JSON/XML Splitter**
How will you parse each item into an object	**Script Parser**

15. Select **Splitter step** in the Action Outline.
16. On the form, fill in the fields.

Splitter step

Field	Value
Source Format	Select **XML** or **JSON**, depending on the format returned by the API response.
Item Path	Absolute path to a user element in the response message. See the documentation for the API that you're working with for information about the format of the response message. ○ Example XML item path: `/message/body/user` ○ Example JSON item path: `$.data.user`

17. Select **Outputs** in the Action Outline.
18. Select **Create Output** and edit the variable as shown.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action Output

Label	Name	Type	Required
targetObject	targetObject	Object	No

19. Add child items for *targetObject* based on the user child elements returned in the response message.
For example, an XML response might look like this.

```
<message>
  <body>
    <user>
      <userID>12345</userID>
      <email>email@email.com</email>
      <firstName>Jane</firstName>
      <lastName>Doe</lastName>
      <lastLoginTime>08/13/2019 20:08:16</lastLoginTime>
      <active>TRUE</active>
    </user>
    <user>
      ...
    </user>
  </body>
</message>
```

For this response, add the child items as shown.

Child items for targetObject

Label	Name	Type	Required
userID	userID	String	No
email	email	String	No
firstName	firstName	String	No
lastName	lastName	String	No
lastLoginTime	lastLoginTime	String	No
active	active	True/False	No

20. Select **Script Parser step** in the Action Outline.
21. Create a *targetObject* output object for each user element in the response and then map each user child element to a *targetObject* child item.

The parser script is executed for each user element.

Note: These examples show the types of elements that are generally contained in a response to a get users request. Don't directly copy these scripts. Use element names from the documentation for the API that you're working with.

Example script that parses an XML response.

```
(function parse(inputs, outputs) {
    var xmlDoc = new XMLDocument(inputs.sourceItem, false);
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
    outputs.targetObject.userID =
 xmlDoc.getNodeText('/user/userID');
    outputs.targetObject.email =
 xmlDoc.getNodeText('/user/email');
    outputs.targetObject.firstName =
 xmlDoc.getNodeText('/user/firstName');
    outputs.targetObject.lastName =
 xmlDoc.getNodeText('/user/lastName');
    outputs.targetObject.lastLoginTime =
 xmlDoc.getNodeText('/user/lastLoginTime');
    outputs.targetObject.active =
 xmlDoc.getNodeText('/user/active');
})(inputs, outputs)
```

Example script that parses a JSON response.

```
(function parse(inputs, outputs) {
    var record = JSON.parse(inputs.sourceItem);
    outputs.targetObject.userID = record.userID;
    outputs.targetObject.email = record.email;
    outputs.targetObject.firstName = record.firstName;
    outputs.targetObject.lastName = record.lastName;
    outputs.targetObject.lastLoginTime = record.lastLoginTime;
    outputs.targetObject.active = record.active;
})(inputs, outputs)
```

22. To test your data stream action, select **Test**.

    a. View the test results and system logs for details about any errors.
    To view system logs, navigate to **System Logs** > **System Log** > **All**.

    b. If your data stream action has errors, make sure that you're using the correct endpoints and that the API requests and responses are structured as expected.

23. After verifying that the data stream action is working as expected, select **Publish**.

What to do next

Create a subflow to get users.

Create a subflow to get users

Create a subflow to add a list of users to the Software Subscription table.

Before you begin

This subflow requires a data stream action to get users. For more information, see Create a data stream action to get users.

Role required: flow_designer

About this task

Note: For examples of subflows to get users, see the Jira Download Subscriptions and Webex Download Subscriptions subflows.

Procedure

1. Navigate to **All** > **Flow Designer** > **Designer**.
2. Select **New** and then select **Subflow**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the form, fill in the fields.

Subflow Properties form

Field	Value
Name	Name of your choice. For example, `Application` Download Subscriptions, where `Application` is the name of the SaaS application that you're integrating with.
Application	Software Asset Management - SaaS License Management
Accessible From	Select **All application scopes**.
Category	Leave this field empty.
Protection	Select **None**.
In-Flow Annotation	Leave this field empty.
Description	Description of your choice.
Run As	User who initiates session.

4. Select **Submit**.
5. Add an integration profile input.

Inputs

Label	Name	Type	Required
Integration profile	integration_profile	Reference.Integration Profile	Yes

6. In the Actions section, select the plus icon and then select **Action** to add a new action.
7. Select the spoke for the SaaS application that you want to integrate with from the list of installed spokes.

> **Note:** To add additional spokes to your list of installed spokes, request them on the ServiceNow Store. For a complete list of available spokes, see IntegrationHub available spokes. If there's no existing spoke for the SaaS application that you want to integrate with, you can create a new spoke.

8. Select a data stream action to get users.
9. Define the values to pass for any user authentication inputs for the data stream action.

   The data stream action might return users that you don't want to include in your list of user subscriptions. If you perform filtering to exclude some users, add an If flow logic as a child of the get users data stream action.

   The amount of filtering required, if any, depends on the application you're integrating with. For example, if the user targetObject has an *`active`* property, you could add a condition to check that the value is **true** to confirm that the subflow doesn't download deactivated users. An example of filtering used by the Jira Download Subscriptions subflow is that the account type can't be **app** to help prevent the subflow from returning accounts that aren't actual users.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Add conditions to the If flow logic for any required filtering.

- If you're using an If flow logic to filter users, add the *Upsert user subscription using subscription identifier* action from the Software Asset Management spoke as a child of the flow logic.
- If you're not filtering users, add the *Upsert user subscription using subscription identifier* action as a child of the get users data stream action. This action adds the SaaS application user subscription to the Software Subscription table [samp_sw_subscription]. If the subscription is already in the table, the action updates the subscription record.

10. Fill in the inputs that are applicable to your integration.

Use values from the data panel to fill in the action inputs. Your ask to the SaaS API might not return data for all the inputs.

Upsert User Subscription action

Field	Value
External user id	User id or account id from the user targetObject. This is generally a numeric, non human-readable value. This value must be unique.
User principal name	Email address from the user targetObject. If an email address isn’t available, use another value such as user name plus user id. This value should be human readable.
Integration profile	Integration profile input that you created for the subflow.
Last Activity	Date of most recent activity from the user targetObject. For example, the last login time.
External created	Account creation date from the user targetObject. This value helps create better reclamation candidates. A new user might not have any activity yet. If the record shows that the user account was created, a reclamation candidate isn't created for that user because it's a new account rather than an unused account.
Identifier	A unique identifier to identify the integration. Software models are automatically created for subscription with an identifier that matches an identifier in the Subscription Product Definitions [samp_sw_subscription_product_definition] table. If an identifier doesn't exist, configure an identifier. For more information, see Configure an identifier.
Additional attributes	This is used to update any other field on the Software Subscriptions [samp_sw_subscription] table that’s not mentioned earlier.

11. To test your subflow, select **Test**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. View the test results and system logs for details about any errors.
To view system logs, navigate to **System Logs** > **System Log** > **All**.

Note: The data stream action to get users should retrieve multiple pages of users successfully. Don't write to the Software Subscriptions [samp_sw_subscription] table until you verify that the data stream action retrieves all users. To verify, you can make a subflow that consumes the data stream and log the results.

12. After verifying that the subflow is working as expected, select **Publish**.

Tip: You can still edit the subflow after it's published.

Configure an identifier

Configure an identifier if it doesn't exist to identify an integration.

Before you begin

Role required: sam_admin

Procedure

1. Create a custom product when your product doesn't exist in the Software Product [samp_sw_product] table.

a. Select **New**.

b. On the form, fill in the fields.

Field	Description
Publisher	Publisher of the custom product.
Product	Name of the custom product.
Product type	Product type of the custom software product.
Product classification	Official UNSPSC classification.
Subscription software	Option indicating that your product is a subscription-based product.
Ignore installs	Option indicating that the product type is licensable. This check box is displayed only if you select Product type as Licensable and Subscription software is set to true.
Exclude from content service	Option that indicates that the product will be excluded from the content service. You must not select this check box.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Active	Option indicating that this product is used or not.

c. Select **Submit**.

2. Create a custom discovery map by creating a custom entitlement definition from the Discovery maps [samp_custom_sw_entitlement_definition] table.

a. Select **New**.

b. On the form, fill in the fields.

Field	Description
Product	Current software product name. Custom product that you created in step 1.
Version condition	Condition qualifier for the Version field: ▪ starts with ▪ is ▪ is anything Default is **is anything**.
Version	Version of the software product. Required if version condition value is starts with or is.
Edition condition	Condition qualifier for the Edition field: ▪ starts with ▪ is ▪ is anything Default is **is anything**.
Edition	Platform of the software product to use when searching for the normalized discovery model.
Platform	Platform of the software product to use when searching for the normalized discovery model.
Language	Language of the software product to use when searching for the normalized discovery model, which is populated once it has been normalized or added manually.

c. Select **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Create a custom subscription product definition by creating a custom entitlement definition from the Custom Subscription Product Definitions [samp_sw_custom_subscription_product_definition] table.

   a. Select **New**.

   b. On the form, fill in the fields.

Field	Description
Identifier	Subscription identifier that is related with the custom product.
Subscription integration	List of SaaS and SSO providers that is mapped to subscription products in the Subscription Product Definition [samp_sw_subscription_product_definition] table. For this scenario, select **Custom Integration**.
Entitlement definition	Custom discovery map that you created in step 2.
Active	Check box indicating the identifier is used or not.

   c. Select **Submit**.

Create a data stream action to get user activity

Create a data stream action to get user activity from a SaaS application.

Before you begin

If you're using an existing ServiceNow® Integration Hub spoke, find out if it has a data stream action to get user activity that you can use instead of creating one.

For more information about data stream actions, see Data Stream actions.

Role required: flow_designer

About this task

Monitor user activity to find software subscriptions that your company is paying for but are not being used. You can reclaim these unused subscriptions to reduce your company's software expenses.

Before creating the data stream action, decide how you want to define meaningful user activity. Meaningful activity can be a combination of user actions. Create a separate data stream action for each user activity metric. For example, the base system Webex Meetings integration defines meaningful activity as hosting a meeting. It uses one data stream action to get the dates of the most recently hosted meetings for all users. If you also wanted the Webex Meetings integration to include logging in as meaningful activity, you would create a second data stream action to get the most recent login times for all users.

Your data stream action to get users may return a user activity metric such as last login time. In this case, you don't need to create a data stream action to get user activity or a subflow to get user activity unless you want to define additional user activity metrics. Make sure that your

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

subflow to get users sets this user activity metric as the **Last activity** input in the **Upsert User Subscription** action.

Procedure

1. Navigate to **All** > **Flow Designer** > **Designer**.
2. Click **New** and then select **Data Stream**.
3. On the form, fill in the fields.

Action Properties form

Field	Value
Name	Name of your choice. For example, `Get User Activity`.
Accessible From	Select **All application scopes**.
Category	Leave this field empty.
Protection	Select **None**.
Application	Spoke app to integrate with the SaaS application. This spoke app can be an existing Integration Hub spoke or a new spoke that you created.
In-Flow Annotation	Leave this field empty.
Description	Description of your choice.

4. Click **Submit**.
5. In the Inputs section of the Action Outline, click **Create Input**.
6. Add a look back time input.

Inputs

Label	Name	Type	Mandatory
Look back time	look_back_time	Date/Time	Yes

7. If the API that you're working with requires user authentication for requests, add inputs for authentication.
   Examples of common user authentication inputs are admin user id and site name. See the documentation for your chosen API to learn about the requirements for user authentication in your specific case. If the API requires an access token, a *`Credential Value`* variable is automatically created later. You don't need to add an access token as an input.

   When you use your completed data stream action in a subflow, you define what values to pass as these inputs.
8. Click **Request** in the Action Outline.
9. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Request form

Field	Value
How will you get data	Choose either **REST Step** or **SOAP step**. Your choice depends on the API for the SaaS application that you're integrating with.
Enable pagination	Selected.
Run a script before each request	Not selected.

10. Click **Pagination Setup step** in the Action Outline.
11. Define pagination variables based on the query parameters used by the SaaS API.

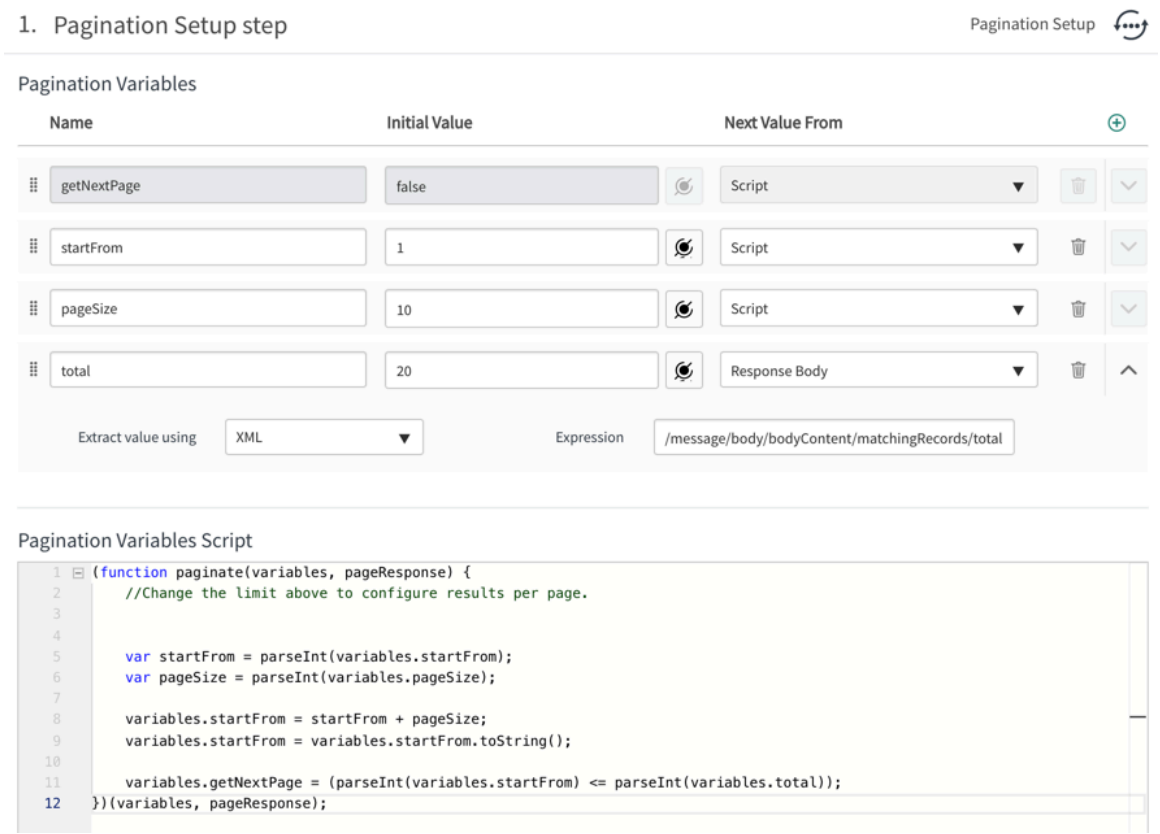
    If you're using offset-based pagination, use the Limit/Offset pagination template to preload the pagination configuration.

    Note: The value of the reserved `getNextPage` variable determines whether to request another page of results. As long as the `getNextPage` variable is **true**, the action continues to send requests for the next page.

12. Write a `Pagination Variables` script to update the pagination variables.

    The script runs on each request. If you're using a pagination template, adjust the preloaded script as needed.

    The following image shows a completed example of the pagination setup step. This example is from the Get Users data stream action used in the Webex Download Subscriptions subflow.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Pagination variables only support the string data type. To perform math operations, convert the value to an integer, perform any required operations, then convert it back to a string.

13. Click **SOAP step** or **REST step** in the Action Outline depending on the option that you selected for how you will get data.
14. If you selected **SOAP**, fill in the details.

SOAP step form

Field	Value
Connection Details	
Connection	**Use Connection Alias**.
Connection Alias	Connection alias that you created when you created the integration profile. If you have not yet created an integration profile, follow the steps to create a custom integration profile with a connection alias.
Endpoint	This value is automatically populated when you select the connection alias. It's set to the Connection URL from the HTTP(s) Connection record linked to the alias.
Request Details	
Build Envelope	**Manually**.
SOAP Action	API request to get a list of meaningful user activity. For example, the base system Webex Meetings integration defines meaningful user activity as hosting a meeting so that it uses the `LstsummaryMeeting` request to get a list of all meetings. See the documentation for your chosen API to select the appropriate request.
SOAP Envelope	XML request message to get a list of all users. See the documentation for your chosen API to learn how to write an XML request message. In general, the header should have your input variables for user authentication as well as the *`Credential Value`* variable as the access token. The body should include the request to get a list of meaningful user activities, a start date set as the **Look back time** input, and your variables from the pagination setup step. **Note:** For an example of a SOAP envelope, see the Get User Activity data stream action used in the Webex Update User Activity subflow.

15. If you selected **REST**, fill in the details.

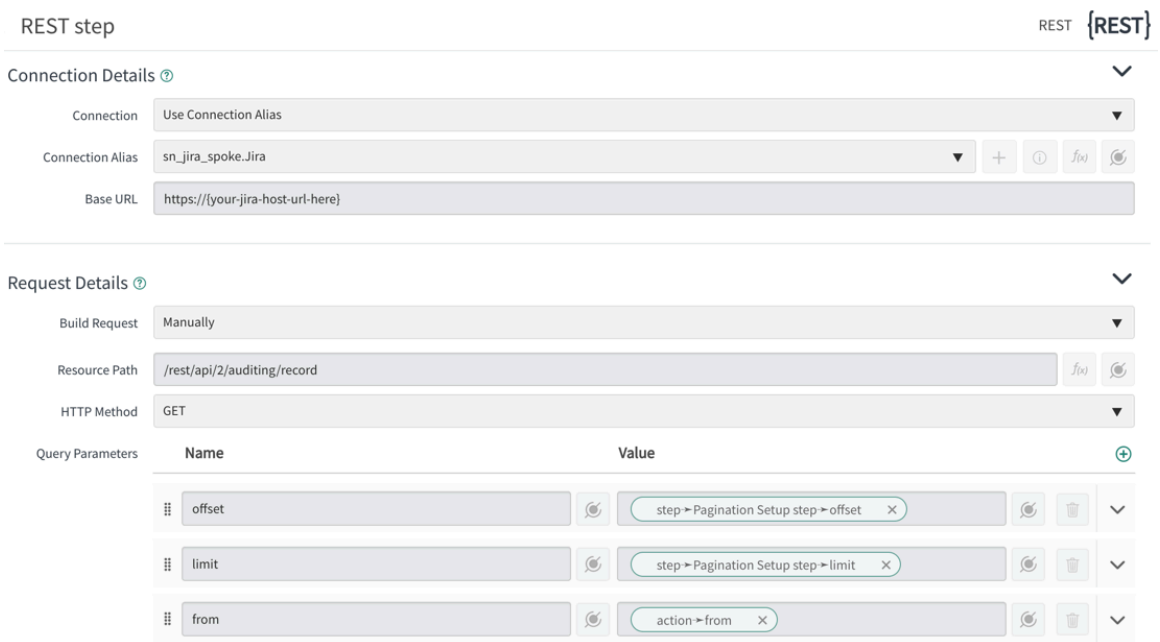
REST step form

Field	Value
Connection Details	
Connection	**Use Connection Alias**.
Connection Alias	Connection alias that you created when you created the integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	If you have not yet created an integration profile, follow the steps to create a custom integration profile with a connection alias.
Base URL	This value is automatically populated when you select the connection alias. It's set to the Connection URL from the HTTP(s) Connection record linked to the alias.
Request Details	
Build Request	**Manually**.
Resource Path	Path to the resource. This value gets appended to the Base URL. See the documentation for the API that you're working with to learn how to construct the resource path.
HTTP Method	**GET**.
Query Parameters	Add parameters for pagination. Set the values as the variables that you created in the Pagination Setup step. Add another parameter for the start date so that the request returns results from the start date to the current date. Set the value as the **Look back time** input. **Note:** Make sure the **Look back time** input date/time variable is correctly formatted for the API that you're working with. If you need to reformat or convert to another data type such as a string, you can do this in the action preprocessing script step.

The following image shows a completed example of the REST step. This example is from the Get Audit Log data stream action used in the Jira Update User Activity subflow.



16. Click **Parsing** in the Action Outline.
17. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Parsing form

Field	Value
How will you identify each record	**JSON/XML Splitter**
How will you parse each item into an object	**Script Parser**

18. Click **Splitter step** in the Action Outline.
19. On the form, fill in the fields.

Splitter step form

Field	Value
Source Format	Select **XML** or **JSON** depending on the format returned by the API response.
Item Path	Absolute path to a meaningful activity element in the response message. See the documentation for the API that you're working with for information about the format of the response message. ○ Example XML item path: `/message/body/meeting` ○ Example JSON item path: `$.data.meeting`

20. Click **Outputs** in the Action Outline.
21. Click **Create Output** and edit the variable as shown.

Action Output

Label	Name	Type	Mandatory
targetObject	targetObject	Object	No

22. Add child items for *`targetObject`* to store the user email and the date of meaningful activity.
For example, an XML response might look like this.

```
<message>
  <body>
    <meeting>
      <meetingID>12345</meetingID>
      <startDate>08/13/2019 20:08:16</startDate>
      <hostEmail>email@email.com</hostEmail>
    </meeting>
    <meeting>
      ...
    </meeting>
  </body>
</message>
```

For this response, add the child items as shown.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Child items for targetObject

Label	Name	Type	Mandatory
email	email	String	No
last_activity	last_activity	String	No

23. In the Action Outline, click **Script Parser step**.
24. Create a *targetObject* output object for each meaningful activity element in the response and then map each the activity date and user email to the *targetObject* child items.

    The parser script is executed for each user element.

    Note: These examples show the types of elements that could be contained in a response. Don't directly copy these scripts. Use element names from the documentation for the API that you're working with.

    Example script that parses an XML response.

```
(function parse(inputs, outputs) {
    var xmlDoc = new XMLDocument(inputs.sourceItem, false);
    outputs.targetObject.email =
 xmlDoc.getNodeText('/meeting/hostEmail');
    outputs.targetObject.last_activity =
 xmlDoc.getNodeText('/meeting/startDate');
})(inputs, outputs)
```

    Example script that parses a JSON response.

```
(function parse(inputs, outputs) {
    var record = JSON.parse(inputs.sourceItem);
    outputs.targetObject.email = record.hostEmail;
    outputs.targetObject.last_activity = record.startDate;
})(inputs, outputs)
```

25. To test your data stream action, click **Test**.

    a. View the test results and system logs for details about any errors.
    To view system logs, navigate to **System Logs** > **System Log** > **All**.

    b. If your data stream action has errors, make sure that you're using the correct endpoints and that the API requests and responses are structured as expected.

26. After verifying that the data stream action is working as expected, click **Publish**.

Create a subflow to get user activity

Create a subflow to update the Software Subscription table with each user's most recent activity in the SaaS application.

Before you begin

This subflow requires a data stream action to get user activity. For more information, see Create a data stream action to get user activity.

Role required: flow_designer

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Note: For examples of subflows to get user activity, see the Jira Update User Activity and Webex Update User Activity subflows.

Procedure

1. Navigate to **All** > **Flow Designer** > **Designer**.
2. Click **New** and then select **Subflow**.
3. On the form, fill in the fields.

Subflow Properties form

Field	Value
Name	Name of your choice. For example, *`Application`* Update User Activity, where *`Application`* is the name of the SaaS application you're integrating with.
Application	**Software Asset Management - SaaS License Management** **Note:** If you save the subflow in the Software Asset Management - SaaS License Management application, it's included with your Software Asset Management subscription. If you save the subflow in any other application, you may be charged for ServiceNow® Integration Hub transactions. If you're publishing your custom spoke application on the ServiceNow Store, select your custom app instead.
Accessible From	**All application scopes**.
Category	Leave this field empty.
Protection	**None**.
In-Flow Annotation	Leave this field empty.
Description	Description of your choice.
Run As	**User who initiates session**.

4. Click **Submit**.
5. Add an integration profile input and a look back time input.

Inputs

Label	Name	Type	Mandatory
Integration profile	integration_profile	Reference.Integration Profile	Yes
Look back time	look_back_time	Date/Time	Yes

6. In the Actions section, click the plus icon and then click **Action** to add a new action.
7. Select the spoke for the SaaS application that you want to integrate with from the list of installed spokes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: To add additional spokes to your list of installed spokes, request them on the ServiceNow Store. For a complete list of available spokes, see IntegrationHub available spokes. If there's no existing spoke for the SaaS application that you want to integrate with, you can create a new spoke.

8. Select a data stream action to get user activity.
9. Add the **Look back time** subflow input as the value to pass to the **Look back time** input for the data stream action.
10. Define the values to pass for any user authentication inputs for the data stream action.
11. Add the *Update User Activity If Later Using User* action from the Software Asset Management spoke as a child of the get user activity data stream action.
12. Use values from the Data panel to complete the action.

Update User Activity If Later action

Field	Value
Last activity	Date of most recent activity from the targetObject.
Integration profile	Integration profile input that you created for the subflow.
External user id	User id or account id from the user targetObject. This id is generally a numeric and non human-readable value. This value must be unique.
User principal name	Email address from the user targetObject. If an email address isn't available, use another value such as user name plus user id. This value should be human readable.

13. If you want to use more than one data stream action to get multiple types of user activity, repeat steps 6 through 12 to add each data stream action to the subflow.
14. Click **Test** to test your subflow.
    a. View the test results and system logs for details about any errors.
    To view system logs, navigate to **System Logs** > **System Log** > **All**.
15. After verifying that the subflow is working as expected, click **Publish**.

Tip: You can still edit the subflow after it's published.

Create an action to remove a user

Create an action to deactivate or delete a user account in the SaaS application.

Before you begin

If you're using an existing ServiceNow® Integration Hub spoke, find out if it has an action to remove a user that you can use instead of creating one.

Role required: flow_designer

About this task

This action is used to reclaim unused subscriptions to reduce your company's software expenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Flow Designer** > **Designer**.
2. Click **New** and then select **Action**.
3. On the form, fill in the fields.

Action Properties form

Field	Value
Name	Name of your choice. For example, **Remove User**.
Accessible From	**All application scopes**.
Category	Leave this field empty.
Protection	**None**.
Application	Spoke app to integrate with the SaaS application. This can be an existing Integration Hub spoke or a new spoke that you created.
In-Flow Annotation	Leave this field empty.
Description	Description of your choice.

4. Click **Submit**.
5. In the Inputs section of the Action Outline, click **Create Input**.
6. Add a user ID input.

   This is how the action gets the user ID of the user to delete.

Inputs

Label	Name	Type	Mandatory
User ID	userID	String	Yes

7. If the API that you're working with requires user authentication for requests, add inputs for authentication.
   Examples of common user authentication inputs are admin user id and site name. See the documentation for your chosen API to learn about the requirements for user authentication in your specific case. If the API requires an access token, a *`Credential Value`* variable is automatically created later so you don't need to add it as an input.

   When you use your completed action in a subflow, you define what values to pass as these inputs.

8. Add a **SOAP step** or **REST step** to the action outline.
   Your choice will depend on the API for the SaaS application that you're integrating with.
9. If you selected **SOAP**, fill in the form as shown.

SOAP step form

Field	Value
Connection Details	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Connection	**Use Connection Alias**.
Connection Alias	Connection alias that you created when you created the integration profile. If you have not yet created an integration profile, follow the steps to create a custom integration profile with a connection alias.
Endpoint	This value is automatically populated when you select the connection alias. It's set to the Connection URL from the HTTP(s) Connection record linked to the alias.
Request Details	
Build Envelope	**Manually**.
SOAP Action	API request to delete or deactivate a user. See the documentation for your chosen API to select the appropriate request.
SOAP Envelope	XML request message to delete a user. See the documentation for your chosen API to learn how to write an XML request message. In general, the header should have your input variables for user authentication as well as the *`Credential Value`* variable as the access token. The body should include the request to delete a user and the user ID input. **Note:** For an example of a SOAP envelope, see the Remove User action used in the Webex Reclaim Subscription subflow.

10. If you selected **REST,** fill in the form as shown.

REST step form

Field	Value
Connection Details	
Connection	**Use Connection Alias**.
Connection Alias	Connection alias that you created when you created the integration profile. If you have not yet created an integration profile, follow the steps to create a custom integration profile with a connection alias.
Base URL	This value is automatically populated when you select the connection alias. It's set to the Connection URL from the HTTP(s) Connection record linked to the alias.
Request Details	
Build Request	**Manually**.
Resource Path	Path to the resource. This value gets appended to the Base URL. See the documentation for the API that you're working with to learn how to construct the resource path.
HTTP Method	**DELETE**.
Query Parameters	Add a parameter for user ID. Set the value as the user ID input.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

11. Add a **Script step** to the Action Outline for error handling.

    a. For **Required Runtime**, select **Instance**.

    b. Create input variables.

    Input Variables

Name	Value
response	Response Body output from the SOAP or REST step
status_code	Status Code output from the SOAP or REST step

    c. Create output variables.

    Output Variables

Label	Name	Type	Mandatory
status	status	Choice	Yes
error_message	error_message	String	Yes

    d. In the **Script** field, write a script to assign values to the status and error message outputs.
    - Use the **status_code** input to check if there is an error. Set the status output equal to **Error** if there is an error and **Success** if there is no error.
    - In cases where there is an error, use the **response** input to get information about the kind of error. Set the **error message** output to a description of the error so that a user can understand what went wrong.

12. In the Action Outline, click **Outputs**.
13. Create output variables.

    Output Variables

Label	Name	Type	Mandatory
Status	status	Choice	No
Error message	error_message	String	No

14. Assign values to the output variables.

    Output Variables

Label	Value
Status	**status** output variable from the script step
Error message	**error_message** output variable from the script step

15. To test your action, click **Test**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. View the test results and system logs for details about any errors.
To view system logs, navigate to **System Logs** > **System Log** > **All**.

b. If your action has errors, make sure that you're using the correct endpoints and that the API request is structured as expected.

Note: When testing, remember that this action deactivates a user. Test this action in a sub-production environment. If only a production environment is available, you can create fake users for testing.

16. After verifying that the action is working as expected, click **Publish**.

Create a subflow to reclaim a user

Create a subflow to reclaim a user subscription.

Before you begin

This subflow requires an action to remove a user. For more information, see Create an action to remove a user.

Role required: flow_designer

About this task

Note: For examples of subflows to reclaim a user, see the Jira Reclaim Subscription and Webex Reclaim Subscription subflows.

Procedure

1. Navigate to **All** > **Flow Designer** > **Designer**.
2. Click **New** and then select **Subflow**.
3. On the form, fill in the fields.

Subflow Properties form

Field	Value
Name	Name of your choice. For example, *`Application`* Reclaim Subscription, where *`Application`* is the name of the SaaS application you are integrating with.
Application	**Software Asset Management - SaaS License Management Integrations**. **Note:** If you save the subflow in the Software Asset Management - SaaS License Management Integrations application, it's included with your Software Asset Management subscription. If you save the subflow in any other application, you may be charged for ServiceNow® Integration Hub transactions. If you're publishing your custom spoke application on the ServiceNow Store, select your custom app instead.
Accessible From	**All application scopes**.
Category	Leave this field empty.
Protection	**None**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
In-Flow Annotation	Leave this field empty.
Description	Description of your choice.
Run As	**User who initiates session**.

4. Add an integration profile input and a user subscription input.

Inputs

Label	Name	Type	Mandatory
Integration profile	integration_profile	Reference.Integration Profile	Yes
User subscription	user_subscription	Reference.Software Subscription	Yes

5. Add an error message output and a status output.

Outputs

Label	Name	Type
Error message	error_message	String
Status	status	String

6. In the Actions section, click the plus icon and then click **Action** to add a new action.
7. In the list of installed spokes, select the spoke for the SaaS application that you're integrating with.

Note: To add additional spokes to your list of installed spokes, request them on the ServiceNow Store. For a complete list of available spokes, see IntegrationHub available spokes. If there's no existing spoke for the SaaS application that you want to integrate with, you can create a new spoke.

8. To remove a user, select an action.
   a. Define the value to pass as the **User ID** input.
   The value that you use depends on the API that you're working with, but it will generally be the **External user ID** or **User principal name** field from the **User subscription** input for this subflow.
   b. Define the values to pass for any user authentication inputs for the action.
9. To check if the Remove User action returns an error, add an If flow logic.
10. Add a child flow logic to assign subflow outputs.

Assign Subflow Outputs

Name	Data
Error message	Error message output from the Remove User action

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

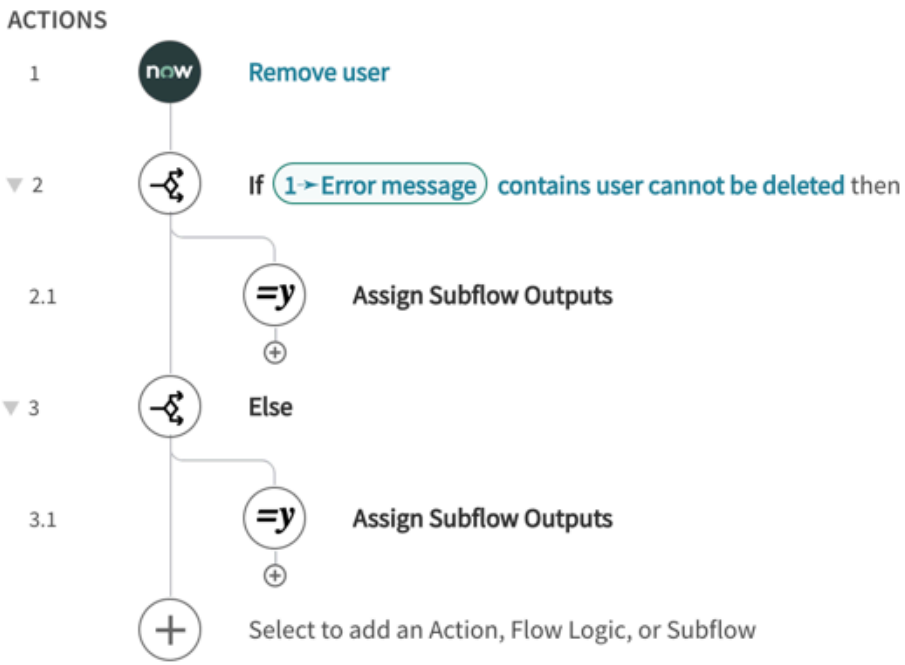
Name	Data
Status	failure

11. Add an Else flow logic at the same level as the If logic for cases when the Remove User action doesn't return an error.
12. Add a child flow logic to assign subflow outputs.

Assign Subflow Outputs

Name	Data
Status	success

The following image shows a completed example of a subflow to reclaim a user subscription. The example shown is the Webex Reclaim Subscription subflow.



13. To test your subflow, click **Test**.
    a. View the test results and system logs for details about any errors.
    To view system logs, navigate to **System Logs** > **System Log** > **All**.

Note: When testing, remember that this subflow deactivates a user. Test this subflow in a sub-production environment. If only a production environment is available, you can create fake users for testing.

14. After verifying that the subflow is working as expected, click **Publish**.

Tip: You can still edit the subflow after it's published.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a subflow to get license consumption

Create a subflow to add license consumption data to the Subscription Consumption Summaries [sam_saas_consumption_summary] table.

Before you begin

This subflow is applicable to any integration that uses the SaaS license connection framework, including custom integrations.

Role required: flow_designer

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
   The Flow Designer launches in a new tab.
2. On the Flow Designer home page, click **New** and then select **Subflow**.
   The Subflow Properties dialog box opens.
3. On the dialog box, fill in the following fields.

Subflow Properties dialog box

Field	Value
Subflow Name	Name of the subflow. For example, `Download License Consumption`.
Description	Description of the subflow.
Application	Application scope to which you want the subflow to apply. Set this field to **Software Asset Management - SaaS License Management Integrations**. **Note:** If you save the subflow in the Software Asset Management - SaaS License Management Integrations application scope, it's included with your Software Asset Management subscription. If you save the subflow in any other application scope, you may be charged for ServiceNow® Integration Hub transactions. If you're publishing your custom spoke application on the ServiceNow Store, select your custom application scope instead.
Accessible From	Application scope from which the subflow is accessible. Set this field to **All application scopes**.
Category	Subflow category. Leave this field empty.
Protection	Read-only protections for your subflow. Set this field to **None**.
Sublow Annotation	Message that appears under the subflow title in the subflow picker. Leave this field empty.
Run As	Option to specify whether the flow runs as a system user or user who initiates the session. Set this field to **User who initiates session**.
Run with role(s)	Roles with which this subflow runs.

4. Click **Submit**.
   The Flow Designer creates the draft subflow and then redirects you to the subflow configuration page.
5. From the subflow configuration page, add an integration profile input.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Under INPUTS & OUTPUTS, click the plus icon (+) to add an input for your subflow.

b. In the Inputs section, click the plus icon (+).

c. When prompted, enter the following information for your integration profile input.

Inputs

Label	Name	Type	Mandatory
Integration profile	integration_profile	Reference.Integration Profile	Yes

d. Click **Done**.

6. Add a data stream action for getting license consumption data.
   a. Under ACTIONS, click the plus icon (+) and then select **Action** to add a new action.
   b. When prompted, select the **Global** spoke from the list of INSTALLED SPOKES.
   c. From the list of Default actions, select **Get <saas-application> Consumption**.
   d. Click **Done**.
7. Add an Upsert Consumption action as a child of the Get <saas-application> Consumption action.
   The Upsert Consumption action uploads license consumption data to the Consumption Summary table on your ServiceNow instance.

   a. Under the Get <saas-application> Consumption action, click the plus icon (+) and then select **Action**.

   b. When prompted, select **Software Asset Management** from the list of INSTALLED SPOKES.

   c. From the list of Default actions, select **Upsert Consumption**.
   The Upsert Consumption action inputs appear.

   d. From the Product [Software Product] list, search for and select the software product that you are connecting to with your integration.
   This value must be a reference to the Software Product (samp_sw_product) table. If the product does not exist in the table, add a custom software product.

   e. Use values from the Data panel to fill in the remaining action inputs.
   Your request to the SaaS API may not return data for all inputs. Fill in the inputs that are applicable to your integration.

Upsert Consumption action inputs

Field	Value
Version	Version of the SaaS application.
Edition	Edition of the SaaS application, such as `Standard` or `Enterprise`.
Unit of consumption	Unit of measure for the software units that can be consumed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Total units	Total number of software units that you have purchased across all active entitlements for the software product.
Units consumed	Total number of software units that your users have consumed.
Contract start	Start date of your contract.
Contract end	End date of your contract.

f. Click **Done**.

8. Verify that your subflow is working properly by clicking **Test**.
   View the test results and system logs for details about any errors in your subflow. You can view system logs by navigating to **System Logs** > **System Log** > **All** in your ServiceNow instance.
9. After verifying that the subflow is working as expected, click **Publish**.

Tip: You can still edit the subflow after it's published.

What to do next

View analytics such as subscription usage, cost, and compliance of your SaaS applications on SaaS overview dashboard in workspace.

Publish a custom integration profile

Publish a custom integration profile to complete the custom integration.

Before you begin

Make sure that all actions and subflows are published in ServiceNow® Workflow Studio before adding them to the integration profile.

Role required: sam_integrator

Procedure

1. Navigate to **All** > **SaaS License** > **Administration** > **All Integration Profiles** and select the custom integration profile that you created.
2. In the Download Subscription Subflow form section, select the Download Subscriptions subflow for the SaaS application.
3. Click **Publish**.
   A software model is automatically created for the SaaS application. A scheduled job is created to immediately run the Download Subscription Subflow, which adds user subscriptions for the SaaS application to the Software Subscription table [samp_sw_subscription].
4. In the Calculate Activity Subflow form section, select the Update User Activity subflow for the SaaS application.

Note: The scheduled job to get user subscriptions must finish before you can add the Update User Activity subflow.

5. Choose a value for the **Analyze user activity from** field.
   You can choose to start analyzing data from the current date or from up to 60 days in the past. Choosing a date in the past enables you to detect stale subscriptions without waiting in real time because you can see subscriptions that haven't been used recently. Because choosing

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a date in the past increases the amount of data that is analyzed, it could take several hours for you to be able to view the results.

This value is passed as the **Look back time** input for the subflow to get user activity.

6. In the Reclaim Subscription Subflow form section, select the Reclaim Subscription subflow for the SaaS application.
7. Click **Save**.

What to do next

Reclamation rules and stale user reclamation candidates are created automatically after the integration is connected. User subscriptions and reclamation candidates are refreshed daily.

It's important that you review all automatically generated reclamation rules to ensure that they meet your specifications for reclaiming user subscriptions. For more information, see Review a software reclamation rule.

Create software entitlements for the automatically generated software models to track software used against software owned. For more information, see Create entitlements in Software Asset Management classic.

Create a store app for a custom integration

Publish your custom integration application on the ServiceNow Store to make it available for others to use.

Before you begin

Role required: admin

About this task

You must complete these steps so that your custom integration works correctly when other users download it from the ServiceNow Store.

Procedure

1. Create a fix script in your custom integration application.
   When a new integration profile is created using your application, the subflows and connection alias you created are automatically linked to the profile through this fix script.

   a. Navigate to **System Applications** > **Studio**.

   b. Select your custom integration application.

   c. On the Welcome to Studio page, click **+ Create New**.
   The Create Application File dialog box opens.

   d. On the dialog box, search for and select `Fix Script`.

   e. Click **Create**.

   f. On the Fix Script form, fill in the following fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Fix Script form

Field	Value
Name	Name of the fix script. For example, `Custom Integration Fix Script`.
Unloadable	Option to create Customer Update [sys_update_xml] records when the fix script runs. Do not select this option.
Application	Your custom integration application. This field is populated automatically.
Before	Option that enables you to run the fix script before installing or upgrading the application. Do not select this option.
Description	Description of the fix script.

g. Enter the following script in the **Script** field.
For the subflows and connection alias, replace the example ids with the real ids. You can find the id in the URL for each item.

```
new
 global.CustomIntegrationProfileUtils().createCustomIntegrati
on({
 name: 'Name', // choose a name for the integration
 downloadSubscriptionSubflow:
 '3a23e189a1400010fa9bed1383c83d38', //replace example id
 updateActivitySubflow:
 '77a66d23e5500010fa9bc9581d0c0f47', //replace example id
 reclamationSubflow:
 'e62b672e39400010fa9b4845e477fe02', //replace example id
 connectionAlias:
 '629ad2bfdb1893005963ff041d961971' //replace example id
});
```

Note: The update activity and reclamation subflows are not required. If you do not include a subflow to update activity, the integration does not get user activity unless your download subscription subflow includes user activity. If you do not include a reclamation subflow, the integration cannot deactivate SaaS user subscriptions.

h. Click **Submit**.

2. Create a cross scope privilege record.
This record allows the fix script you created to access the CustomIntegrationProfileUtils() script include.

a. Navigate to **System Applications** > **Application Cross-Scope Access**.

b. Click **New**.

c. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cross scope privilege

Field	Value
Source Scope	Your custom integration application. This field is populated automatically. To select a different application, click the Settings () icon on the banner frame of your ServiceNow instance. On the System Settings dialog box, select the **Developer** tab and then choose an application from the **Application** drop-down list.
Target Scope	Application from which resources are being requested. Select the search  icon to locate and select the **Global** application.
Target Name	Name of the script include. Set this field to `CustomIntegrationProfileUtils`.
Target Type	Type of request. Select **Script Include**.
Application	Your custom integration application. This field is populated automatically.
Operation	Operation that the script performs on the target scope. Select **Execute API**.
Status	Authorization for this cross scope privilege record. Select **Allowed**.

d. Click **Submit**.

What to do next

Before you publish your custom integration application on the ServiceNow Store, make sure that your actions and subflows are active, published, and saved in your application.

Viewing your SaaS and SSO subscriptions

View a list of all subscriptions for your SaaS and Single Sign-On (SSO) applications.

Important: You can view your SaaS and SSO subscriptions in both the Software Asset Management Core UI and the Software Asset Workspace. This topic provides details on viewing your subscriptions in the Software Asset Management Core UI application. For more information on viewing your subscriptions in the Software Asset Workspace, see SaaS overview dashboard in workspace.

To view subscriptions for all SaaS and SSO applications, navigate to **All** > **SaaS License** > **All User Subscriptions**.

Software Subscriptions list

Column	Description
Display name	The software publisher and product for the subscription.
User principle name	The user's email address for the subscription.
Software Model	The software model for the subscription.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Subscriptions list (continued)

Column	Description
Subscription profile	The direct integration profile for the subscription. This field is empty if the subscription is from an SSO integration.
Subscription type	Classifies the subscription as a software subscription or an SSO subscription.

Note: You can add the **Subscription assigned** column to view the date a user was given access to an app. For SSO subscriptions, this field is empty if the user has access to the app through a group membership.

You can also view all subscriptions for an application in the Software Subscriptions related list on the software model.

Viewing SSO subscription information

You can view information about the Single Sign-On (SSO) applications, SSO users, and SSO groups that are associated with your SSO integrations.

Important: You can view information about your SSO applications, users, and groups in both the Software Asset Management Core UI and Software Asset Workspace. The following sections provide details on viewing this information in the Software Asset Management classic application. For details on viewing this information in the Software Asset Workspace, see License operations view.

Viewing SSO integration information

To view the applications, users, and groups for an SSO integration, navigate to **All** > **SaaS License** > **Administration** > **SSO Integration Profiles** and then select a profile. The related lists provide information about the integration.

SSO Integration Profile related lists

List	Description
SSO Applications	All SSO applications.
Directory Users	All SSO users.
Directory Groups	All SSO groups.
Scheduled Jobs	*SAM - SSO <sso-provider> download applications* scheduled job that downloads all SSO apps. The job runs when the SSO integration profile is published, and then runs daily. The *SAM - SSO <sso-provider> update connected applications* scheduled job downloads users, groups, and subscriptions for SSO apps. The job runs daily and whenever an app is connected.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SSO Integration Profile related lists (continued)

List	Description
Scheduled Job Results	Status of the scheduled jobs.
Directory Jobs	The *<sso-provider> - Download Group Membership* directory job that downloads group memberships for all users. The job runs when the SSO integration profile is published, and then runs daily. The *<sso-provider> - Download Users* directory job downloads all users. The job runs when the SSO integration profile is published, and then runs daily. The *<sso-provider> - Download Groups* directory job downloads all groups for all users. The job runs when the SSO integration profile is published, and then runs daily. **Note:** On upgrading to Microsoft Entra ID spoke 4.3 version, the *Microsoft Azure AD - Download Group Membership* directory job won't be executed for existing Microsoft Entra ID SSO or Directory integrations. This directory job also won't be created for new Microsoft Entra ID SSO or Directory integrations. Instead, the *Microsoft Azure AD - Download Groups* directory job downloads all groups and group memberships configured on Microsoft Entra ID.
Directory Job Results	Status of the directory jobs.

Viewing SSO application information

To view the users, groups, and reclamation candidates for an application, navigate to **All** > **SaaS License** > **SSO Applications** and select an application. The related lists show information for the application. For viewing the SSO application information in Software Asset Workspace, see View SSO applications in workspace.

SSO Applications related list

List	Description
SSO Application Users	All users that have direct access to the application, but not through membership in a group.
SSO Application Groups	All groups that have access to the application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SSO Applications related list (continued)

List	Description
SSO Subscriptions	Total number of subscriptions for the application. A user may have both direct access to an app and have access through a group. But the user's access counts as only one subscription so as only one record in the SSO Subscriptions list. **Note:** • Add the **SSO application role** column to see how the user is granted access to the application. If the value is a group, then the user has access through membership in that group. If the value is the user's name, then the user has direct access to the application. User subscriptions can't be reclaimed in Software Asset Management if the user has access to the application through a group membership. To reclaim the subscription, remove the user from the group in the Azure AD portal and set the reclamation candidate state to **Closed Complete**. • When SSO subscriptions are created through SSO application groups, the **Subscription assigned** value is empty. When the subscriptions are created through SSO Application Users, the **Subscription assigned** value shows the date of when the subscription is assigned to the user. After you upgrade to the Software Asset Management - SaaS License Management 13.1.0 version or later, the existing **Subscription assigned** values for the subscriptions that were created through SSO application groups turns empty.
Reclamation Candidates	Subscriptions that don't meet the usage requirements that are defined by the reclamation rule for the application.
SSO Group Software Model Mappings	SSO groups that are mapped to specific software models for managing licenses at the group level.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Data synchronization with SSO providers

If you delete a user, group, or app in the Azure AD portal or in the Okta Developer Console, then the corresponding records in Software Asset Management are deleted when the daily scheduled jobs run. If you revoke a user's access to an application in the Azure AD portal or in the Okta Developer Console, either directly or indirectly by removing them from a group, then the corresponding user subscription record is deleted when the daily scheduled jobs run.

Create an SSO group software model mapping

Create a mapping for an SSO group with a software model to manage your licenses on group level rather than on application level.

Before you begin

Role required: sam_integrator or admin

About this task

You must map an SSO group with a specific software model before connecting the SSO application to view all users and groups with access to the application. This mapping enables you to manage applications that have different license models that are associated at group level.

Procedure

1. Select the SSO application for which you want to create the mapping.
2. On the **Details** tab, select the **Enable group based software model** check box.

   After selecting this option, the **SSO Group Software Model Mappings** tab starts appearing as a related list for the SSO application.
3. Select the **SSO Group Software Model Mappings** tab.
4. On the Create New SSO Group Software Model Mapping page, select the SSO application group.
5. Select the software model with which you want to map the SSO group.
6. Select **Save**.

Related topics

Connect SSO apps

Viewing SSO subscription information

Review a software reclamation rule

Use reclamation rules to cancel user subscriptions that have limited to no activity.

Before you begin

Role required: sam_admin

About this task

When you create a direct integration profile or connect an SSO application, a reclamation rule is automatically created for the software. It's important that you review the reclamation rule to verify that it meets your specifications. For more information about the reclamation rules for each application, see Reclamation rules for SaaS and SSO applications and Reclamation rules for Microsoft 365 integration.

For SSO subscriptions, the reclamation rule checks for user logins.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Reclamation Rules** and select the reclamation rule that corresponds to your integration profile.
2. On the form, review the fields.

Reclamation Rules form

Field	Description
Name	Name for the reclamation rule.
Applies to	Item type that the reclamation rule applies to.
Include usage from additional discovery sources	This field appears only when you are reviewing the Microsoft 365 and Office 365 reclamation rules. For more information, see Reclamation rules for Microsoft 365 integration. When selected, the usage for Microsoft Access and Publisher is considered from additional discovery solutions such as Microsoft SCCM or ACC-V for E3 to E1 optimization.
Notify user	Option for notifying users via email that their accounts will be reclaimed unless they respond with a request to keep the accounts. If a user wants to keep a license, it becomes the responsibility of the manager to approve or reject the removal of the license.
Days before auto-reclamation	If no response is received from the user within the specified number of days, the account is reclaimed. **Note:** This field appears when **Notify user** is selected.
Subscription Usage Condition	
Last activity threshold	Time limit for no meaningful activity before a user account is added to the list of reclamation candidates. The default value is 60 days for direct integrations and 30 days for SSO applications.

3. Select **Update**.

What to do next

View the reclamation candidates that are identified by your reclamation rule and start reclaiming user subscriptions.

Related topics

- Integrate with SaaS applications
- Reclamation rules for SaaS and SSO applications
- Reclamation rules for Microsoft 365 integration

Reclaiming user subscriptions

You can reclaim unused SaaS and SSO subscriptions to reduce your total software costs.

The process of reclaiming a user subscription is similar to reclaiming a software license in ServiceNow® Software Asset Management. You can reclaim user subscriptions in both the Software Asset Management Core UI and the Software Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

When you're reclaiming a user subscription, you can determine the status of the associated removal candidate using the following removal candidate states.

Removal candidate states

State	Description
Attention Required	The removal candidate requires attention. The state is set to **Attention Required** when the **User** field is empty on an automatic removal candidate that has the **Notify User** option enabled. After the **User** field is populated, the state automatically changes to **Ready**. The state can also be set to **Attention Required** when a reclamation fails. After you resolve the error, the state automatically changes to **Ready**.
Ready	The removal candidate is ready for reclamation. Select **Reclaim** to advance the reclamation workflow.
Awaiting User	The user has been sent an email notification to approve or deny the removal request. This state is applicable only if the **Notify User** option is enabled on the removal candidate.
Awaiting Approval	The user must approve or deny the removal request. If the user wants to keep the subscription, the manager then becomes responsible for approving or declining the removal. This state is applicable only if the **Notify User** option is enabled on the removal candidate.
Awaiting Revocation	The removal candidate is awaiting reclamation. You can manually reclaim the user subscription in the removal candidate by selecting **Close Complete**. Alternatively, you can reclaim the user subscription through the **SAM — Updating Existing Reclamation Candidates** weekly scheduled job. When the scheduled job runs, removal candidates that are in the **Awaiting Revocation** state and have an empty **User subscription** field are automatically updated to the **Closed Complete** state. If the **User subscription** field is empty for a removal candidate that is in any other state, the reclamation workflow is canceled and the state automatically changes to **Closed Skipped**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Removal candidate states (continued)

State	Description
	The state of a removal candidate with restricted software is automatically set to **Awaiting Revocation**. The justification is set to **Restricted Software**.
Closed Complete	The user subscription has been reclaimed.
Closed Skipped	The user subscription hasn't been reclaimed by the removal candidate.
Closed Canceled	The user subscription hasn't been reclaimed by the removal candidate because user activity is detected.

Related topics

Reclamation rules for SaaS and SSO applications

Reclaim user subscriptions in Software Asset Management classic

Reclaim unused SaaS and SSO subscriptions in the Software Asset Management classic application.

Before you begin
Role required: sam_user

Important: The SaaS License Management SurveyMonkey integration does not support reclamation through the ServiceNow AI Platform. To reclaim a SurveyMonkey user subscription, you must reassign or delete the user from your SurveyMonkey team directly using the SurveyMonkey admin portal. After the user is removed from your team, you must update the state of the corresponding removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table. See Reclaim SurveyMonkey user subscriptions in Software Asset Management classic for detailed instructions.

Important: The SaaS License Management monday.com integration does not support reclamation through the ServiceNow AI Platform. To reclaim a monday.com user subscription, you must deactivate the user on your monday.com account. After the user is deactivated, you must update the state of the corresponding removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table. See Reclaim monday.com user subscriptions in Software Asset Management classic for detailed instructions.

Important: The SaaS License Management Roadmunk integration does not support reclamation through the ServiceNow AI Platform. To reclaim a Roadmunk user subscription, you must deactivate the user on your Roadmunk account. After the user is deactivated, you must update the state of the corresponding removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table. See Reclaim Roadmunk user subscriptions in Software Asset Management classic for detailed instructions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Software Asset** > **Removal Candidates** > **Reclamation Candidates**.
2. To reclaim a user subscription that was not automatically identified by a software reclamation rule, create a software removal candidate.
   See Add a software removal candidate in Software Asset Management classic for detailed instructions on how to create a software removal candidate in the Software Asset Management classic application.
3. Reclaim user subscriptions.
   - To reclaim all user subscriptions, click **Reclaim All**.

     Note: Use caution when reclaiming all user subscriptions. Some users may still need their subscriptions even if they have no activity.

   - To reclaim a set of user subscriptions, specify your Search filter criteria and then click **Reclaim All**. For example, you can reclaim all user subscriptions for Adobe InDesign by selecting **Product** from the Search list and then entering `*InDesign`.

   - To reclaim an individual user subscription, select a removal candidate and then click **Reclaim** on the Removal Candidate form.

Result

After you reclaim a user subscription, the subscription record is deleted from the Software Subscriptions [samp_sw_subscription] table. The reclamation candidate state is set to **Closed Complete**. If the reclamation fails, the state is set to **Attention Required**. An error message is displayed at the top of the screen with additional details on how to resolve the error.

Reclaim SurveyMonkey user subscriptions in Software Asset Management classic

Reclaim unused SurveyMonkey subscriptions to reduce your total software costs.

Before you begin

SurveyMonkey Role required: admin

ServiceNow Role required: sam_user

About this task

The SaaS License Management SurveyMonkey integration does not support reclamation through the ServiceNow AI Platform. When Software Asset Management creates a removal candidate for your SurveyMonkey integration, you can reclaim the user subscription by removing the associated user directly from your SurveyMonkey team. After you remove the user from your team, you must update the state of the removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table.

Procedure

1. Identify removal candidates for your SurveyMonkey integration.

   a. From your ServiceNow instance, navigate to **Software Asset** > **SaaS License** > **Direct Integration Profiles**.

   b. Select your SurveyMonkey integration profile from the Integration Profiles list.

   c. On the **Software Models** tab of the Integration Profile form, select the software model that is associated with the integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

d. On the Software Model form, select the **Reclamation Candidates** related tab to view the list of available removal candidates.

e. Take note of the user principal name for each removal candidate that you want to reclaim the user subscription for.
Save this information for later use.

2. Remove the associated users from your SurveyMonkey team.
Based on the list of removal candidates that you identified in step 1, you can reclaim user subscriptions by reassigning or deleting the associated users from your SurveyMonkey team.

a. From a web browser, open SurveyMonkey.

b. Log in using your admin credentials.

c. On the left navigation menu, select **Manage Users**.
The Manage Users page opens, where you can view the complete list of users in your SurveyMonkey team.

d. Click the ellipsis icon (...) for the user that you want to remove from your team.
You can identify which user you want to remove based on the associated username. The username corresponds directly to the user principal name of each removal candidate that you identified in step 1.

e. When prompted, select either **Reassign Account** or **Delete Account**.
Select **Reassign Account** to move the user to another SurveyMonkey team. Select **Delete Account** to deactivate the user completely.

f. Repeat steps d and e for each user that you want to remove.

3. Return to your ServiceNow instance to update the state of each removal candidate to **Closed Skipped**.

a. From your ServiceNow instance, navigate to **SaaS License** > **Administration** > **Direct Integration Profiles**.

b. Select your SurveyMonkey integration profile from the Integration Profiles list.

c. On the **Software Models** tab of the Integration Profile form, select the software model that is associated with the integration profile.

d. On the Software Model form, select the **Reclamation Candidates** related tab.

e. From the list of available removal candidates, select the removal candidate number (RCCxxxxxxx) for a user that you removed from your SurveyMonkey team in step 2.

f. On the Removal Candidate form, update the state of the removal candidate by clicking **Closed Skipped**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management removes the user subscription from the Software Subscriptions [samp_sw_subscription] table and automatically returns you to the Software Model form.

g. Repeat steps d through f for each user that you removed from your SurveyMonkey team.

Reclaim monday.com user subscriptions in Software Asset Management classic

Reclaim unused monday.com subscriptions to reduce your total software costs.

Before you begin

monday.com Role required: admin

ServiceNow Role required: sam_user

About this task

The SaaS License Management monday.com integration doesn't support reclamation through the ServiceNow AI Platform. When Software Asset Management creates a removal candidate for your monday.com integration, you can reclaim the user subscription by deactivating the associated user on your monday.com account. After you deactivate the user, you must update the state of the removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table.

Procedure

1. Identify removal candidates for your monday.com integration.

a. From your ServiceNow instance, navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**.

b. Select your monday.com integration profile from the Integration Profiles list.

c. On the **Software Models** tab of the Integration Profile form, select the software model that is associated with the integration profile.

d. On the Software Model form, select the **Reclamation Candidates** related tab to view the list of available removal candidates.

e. Take note of the user principal name for each removal candidate that you want to reclaim the user subscription for.
Save this information for later use.

2. Deactivate the associated users on your monday.com account.
Based on the list of removal candidates that you identified in step 1, you can reclaim user subscriptions by deactivating the associated users on your monday.com account.

a. From a web browser, go to monday.com.

b. Log in using your admin credentials.

c. At the bottom of the left navigation menu, select your profile icon and then select **Admin**.
The Admin section opens.

d. In the Admin section, select **Users**.
The **Users** tab of the Users subsection opens. This tab displays the complete list of users on your monday.com account.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. From the list of users, select the ellipsis icon (...) for the user that you want to deactivate. You can identify which user you want to deactivate based on the associated user name or email address. The user name or email address corresponds directly to the user principal name of each removal candidate that you identified in step 1.

f. When prompted, select **Deactivate user**.

g. Repeat steps e and f for each user that you want to deactivate.

3. Return to your ServiceNow instance to update the state of each removal candidate to **Closed Skipped**.
   a. From your ServiceNow instance, navigate to **SaaS License** > **Administration** > **Direct Integration Profiles**.
   b. Select your monday.com integration profile from the Integration Profiles list.
   c. On the **Software Models** tab of the Integration Profile form, select the software model that is associated with the integration profile.
   d. On the Software Model form, select the **Reclamation Candidates** related tab.
   e. From the list of available removal candidates, select the removal candidate number (RCCxxxxxxx) for a user that you deactivated in step 2.
   f. On the Removal Candidate form, update the state of the removal candidate by selecting **Closed Skipped**.
   g. Close the **Removal Candidate** tab.
4. Verify the user deletion from the monday.com portal.
   a. Run the *`Refresh Monday.com subscriptions`* scheduled job.
   b. Verify the user deletion in the Software Subscriptions [samp_sw_subscription] table.

Reclaim Roadmunk user subscriptions in Software Asset Management classic

Reclaim unused Roadmunk subscriptions to reduce your total software costs.

Before you begin

Roadmunk Role required: Account Admin

ServiceNow Role required: sam_user

About this task

The SaaS License Management Roadmunk integration does not support reclamation through the ServiceNow AI Platform. When Software Asset Management creates a removal candidate for your Roadmunk integration, you can reclaim the user subscription by deactivating the associated user on your Roadmunk account. After you deactivate the user, you must update the state of the removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table.

Procedure

1. Identify removal candidates for your Roadmunk integration.
   a. From your ServiceNow instance, navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**.
   b. Select your Roadmunk integration profile from the Integration Profiles list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. On the **Software Models** tab of the Integration Profile form, select the software model that is associated with the integration profile.

d. On the Software Model form, select the **Reclamation Candidates** related tab to view the list of available removal candidates.

e. Take note of the user principal name for each removal candidate that you want to reclaim the user subscription for.
Save this information for later use.

2. Deactivate the associated users on your Roadmunk account.
Based on the list of removal candidates that you identified in step 1, you can reclaim user subscriptions by deactivating the associated users on your Roadmunk account.

a. From a web browser, open Roadmunk.

b. Log in using your Account Admin credentials.
The Roadmunk dashboard opens.

c. On the left navigation menu of the Roadmunk dashboard, click your profile icon and then select **Account Settings**.
Your account settings open.

d. On the page header of your account settings, select the **Users** tab.
This tab displays the complete lists of users on your Roadmunk account, including collaborators, reviewers, and inactive users.

e. Click the **Active** toggle button for every user that you want to deactivate.
You can determine which users you want to deactivate based on the email address that is associated with each user. The email address corresponds directly to the user principal name of each removal candidate that you identified in step 1.

f. Click **Save**.

The users are deactivated and added to the list of inactive users.

Note: By default, the Roadmunk Download Subscriptions subflow within the ServiceNow SaaS License Management Roadmunk integration downloads all users in your Roadmunk account, including both active and inactive users. To download only the active users in your account, you must download your Roadmunk User Report and then attach it to the Roadmunk integration profile on your ServiceNow instance. See step 7 of Create a Roadmunk integration profile for detailed instructions.

3. **Optional:** Delete deactivated users from your Roadmunk account.
If a deactivated user is no longer part of your organization or team, you can delete the user from your Roadmunk account.

Warning: Users are deleted permanently. Proceed with caution, as users cannot be restored once deleted.

a. On the same **Users** tab of your Roadmunk account settings, select **INACTIVE USERS**.
The list of inactive users opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. Click the Remove icon  for the user that you want to delete.
The removal confirmation dialog box opens.

c. On the dialog box, click **Delete**.
The user is deleted from your account and all roadmaps are unassigned from the user.

> **Note:** The user is not notified about being deleted from your account. Any comments that either mention or are made by the user are updated to indicate that the user has been deleted. All roadmaps that are owned by the user are retained in your account and can be managed by any Account Admin. You can view these roadmaps at any time in the All Roadmaps list on the Roadmaps homepage. If the user is invited back to Roadmunk under the same email address, you must manually reassign these roadmaps to the user.

d. Repeat steps b and c for each user that you want to delete.

4. Return to your ServiceNow instance to update the state of each removal candidate to **Closed Skipped**.

a. From your ServiceNow instance, navigate to **SaaS License** > **Administration** > **Direct Integration Profiles**.

b. Select your Roadmunk integration profile from the Integration Profiles list.

c. On the **Software Models** tab of the Integration Profile form, select the software model that is associated with the integration profile.

d. On the Software Model form, select the **Reclamation Candidates** related tab.

e. From the list of available removal candidates, select the removal candidate number (RCCxxxxxxx) for a user that you deactivated in step 2.

f. On the Removal Candidate form, update the state of the removal candidate by clicking **Closed Skipped**.
Software Asset Management removes the user subscription from the Software Subscriptions [samp_sw_subscription] table and automatically returns you to the Software Model form.

g. Repeat steps d through f for each user that you deactivated on your Roadmunk account.

Reclaim user subscriptions in the Software Asset Workspace

Reclaim unused SaaS and SSO subscriptions in the Software Asset Workspace.

Before you begin

To reclaim user subscriptions in the Software Asset Workspace, you must request and activate the Software Asset Workspace (sn_sam_workspace) store application. See Request Software Asset Management for more details on requesting and activating the Software Asset Workspace (sn_sam_workspace) store application.

Role required: sam_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: The SaaS License Management SurveyMonkey integration doesn't support reclamation through the ServiceNow AI Platform. To reclaim a SurveyMonkey user subscription, you must reassign or delete the user from your SurveyMonkey team directly using the SurveyMonkey admin portal. After the user is removed from your team, you must update the state of the corresponding removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table. See Reclaim SurveyMonkey user subscriptions in the Software Asset Workspace for detailed instructions.

Important: The SaaS License Management monday.com integration does not support reclamation through the ServiceNow AI Platform. To reclaim a monday.com user subscription, you must deactivate the user on your monday.com account. After the user is deactivated, you must update the state of the corresponding removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table. See Reclaim monday.com user subscriptions in the Software Asset Workspace for detailed instructions.

Important: The SaaS License Management Roadmunk integration does not support reclamation through the ServiceNow AI Platform. To reclaim a Roadmunk user subscription, you must deactivate the user on your Roadmunk account. After the user is deactivated, you must update the state of the corresponding removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table. See Reclaim Roadmunk user subscriptions in the Software Asset Workspace for detailed instructions.

Procedure

1. From your ServiceNow instance, navigate to **Software Asset** > **Software Asset Workspace**.
2. To reclaim a user subscription that was not automatically identified by a software reclamation rule, create a software removal candidate.
   See Create a software removal candidate in workspace for detailed instructions on how to create a software removal candidate in the Software Asset Workspace.
3. From the side menu of the Software Asset Workspace, navigate to **License operations** > **Reclamation** > **Removal candidates**.
4. Reclaim user subscriptions.
   - To reclaim all user subscriptions, select **Reclaim All**.

     Note: You must confirm before reclaiming all user subscriptions. Some users may still need their subscriptions even if they have no activity.

   - To reclaim an individual user subscription, select a removal candidate and then select **Reclaim** on the Removal Candidate form.

Result

After you reclaim a user subscription, the subscription record is deleted from the Software Subscriptions [samp_sw_subscription] table. The reclamation candidate state is set to **Closed Complete**. If the reclamation fails, the state is set to **Attention Required**. An error message is displayed at the top of the screen with additional details on how to resolve the error.

Reclaim SurveyMonkey user subscriptions in the Software Asset Workspace

Reclaim unused SurveyMonkey subscriptions to reduce your total software costs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

To reclaim user subscriptions in the Software Asset Workspace, you must request and activate the Software Asset Workspace (sn_sam_workspace) store application. See Request Software Asset Management for more details on requesting and activating the Software Asset Workspace (sn_sam_workspace) store application.

SurveyMonkey Role required: admin

ServiceNow Role required: sam_user

About this task

The SaaS License Management SurveyMonkey integration doesn't support reclamation through the ServiceNow AI Platform. When Software Asset Management creates a removal candidate for your SurveyMonkey integration, you can reclaim the user subscription by removing the associated user directly from your SurveyMonkey team. After you remove the user from your team, you must update the state of the removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table.

Procedure

1. Identify removal candidates for your SurveyMonkey integration.

   a. From your ServiceNow instance, navigate to **Software Asset** > **Software Asset Workspace** > **License usage**.

   b. On the **Publishers** tab of the License usage view, select **SurveyMonkey** from the list of available publishers.
   The SurveyMonkey publisher overview opens.

   c. Select the **Removal Candidates** related list to view the list of available removal candidates.

   d. Take note of the removal candidates for which you want to reclaim the user subscription. Save this information for later use.

2. Remove the associated users from your SurveyMonkey team.
   Based on the list of removal candidates that you identified in step 1, you can reclaim user subscriptions by reassigning or deleting the associated users from your SurveyMonkey team.

   a. From a web browser, open SurveyMonkey.

   b. Log in using your admin credentials.

   c. On the side navigation menu, select **Manage Users**.
   The Manage Users page opens, where you can view the complete list of users in your SurveyMonkey team.

   d. Select the ellipsis icon (...) for the user that you want to remove from your team.

   e. When prompted, select either **Reassign Account** or **Delete Account**.
   Select **Reassign Account** to move the user to another SurveyMonkey team. Select **Delete Account** to deactivate the user completely.

   f. Repeat steps d and e for each user that you want to remove.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Return to your ServiceNow instance to update the state of each removal candidate to **Closed Skipped**.

   a. From your ServiceNow instance, navigate to **Software Asset** > **Software Asset Workspace** > **License usage**.

   b. On the **Publishers** tab of the License usage view, select **SurveyMonkey** from the list of available publishers.
   The SurveyMonkey publisher overview opens.

   c. Select the **Removal Candidates** related list.

   d. From the list of available removal candidates, select the removal candidate number (RCCxxxxxxx) for a user that you removed from your SurveyMonkey team in step 2.

   e. On the Removal Candidate form, update the state of the removal candidate by selecting **Closed Skipped**.
   Software Asset Management removes the user subscription from the Software Subscriptions [samp_sw_subscription] table.

   f. Close the Removal Candidate form.

   g. Repeat steps e through g for each user that you removed from your SurveyMonkey team.

Reclaim monday.com user subscriptions in the Software Asset Workspace

Reclaim unused monday.com subscriptions to reduce your total software costs.

Before you begin

To reclaim user subscriptions in the Software Asset Workspace, you must request and activate the Software Asset Workspace (sn_sam_workspace) store application. See Request Software Asset Management for more details on requesting and activating the Software Asset Workspace (sn_sam_workspace) store application.

monday.com Role required: admin

ServiceNow Role required: sam_user

About this task

The SaaS License Management monday.com integration doesn't support reclamation through the ServiceNow AI Platform. When Software Asset Management creates a removal candidate for your monday.com integration, you can reclaim the user subscription by deactivating the associated user on your monday.com account. After you deactivate the user, you must update the state of the removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table.

Procedure

1. Identify removal candidates for your monday.com integration.

   a. From your ServiceNow instance, navigate to **Software Asset** > **Software Asset Workspace**.
   The Software Asset Workspace launches in a new tab.

   b. From the side navigation menu of the Software Asset Workspace, select **License usage**.
   The License usage view opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. On the **Publishers** tab of the License usage view, select **monday.com Ltd.** from the list of available publishers.
The monday.com Ltd. publisher overview opens.

d. Select the **Removal Candidates** related list to view the list of available removal candidates.

e. Take note of the removal candidates that you want to reclaim the user subscription for. Save this information for later use.

2. Deactivate the associated users on your monday.com account.
Based on the list of removal candidates that you identified in step 1, you can reclaim user subscriptions by deactivating the associated users on your monday.com account.

a. From a web browser, go to monday.com.

b. Log in using your admin credentials.

c. At the bottom of the side navigation menu, select your profile icon and then select **Admin**.
The Admin section opens.

d. In the Admin section, select **Users**.
The **Users** tab of the Users subsection opens. This tab displays the complete list of users on your monday.com account.

e. From the list of users, select the ellipsis icon (...) for the user that you want to deactivate.

f. When prompted, select **Deactivate user**.

g. Repeat steps e and f for each user that you want to deactivate.

3. Return to your ServiceNow instance to update the state of each removal candidate to **Closed Skipped**.

a. From your ServiceNow instance, navigate to **Software Asset** > **Software Asset Workspace**.
The Software Asset Workspace launches in a new tab.

b. From the side navigation menu of the Software Asset Workspace, select **License usage**.
The License usage view opens.

c. On the **Publishers** tab of the License usage view, select **monday.com Ltd.** from the list of available publishers.
The monday.com Ltd. publisher overview opens.

d. Select the **Removal Candidates** related list.

e. From the list of available removal candidates, select the removal candidate number (RCCxxxxxxx) for a user that you deactivated in step 2.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

f. On the Removal Candidate form, update the state of the removal candidate by selecting **Closed Skipped**.

g. Close the **Removal Candidate** tab.

4. Verify the user deletion from the monday.com portal.
   a. Run the *`Refresh Monday.com subscriptions`* scheduled job.
   b. Verify the user deletion in the Software Subscriptions [samp_sw_subscription] table.

Reclaim Roadmunk user subscriptions in the Software Asset Workspace

Reclaim unused Roadmunk subscriptions to reduce your total software costs.

Before you begin

To reclaim user subscriptions in the Software Asset Workspace, you must request and activate the Software Asset Workspace (sn_sam_workspace) store application. See Request Software Asset Management for more details on requesting and activating the Software Asset Workspace (sn_sam_workspace) store application.

Roadmunk Role required: Account Admin

ServiceNow Role required: sam_user

About this task

The SaaS License Management Roadmunk integration doesn't support reclamation through the ServiceNow AI Platform. When Software Asset Management creates a removal candidate for your Roadmunk integration, you can reclaim the user subscription by deactivating the associated user on your Roadmunk account. After you deactivate the user, you must update the state of the removal candidate to **Closed Skipped** so that the user subscription is removed from the Software Subscriptions [samp_sw_subscription] table.

Procedure

1. Identify removal candidates for your Roadmunk integration.

   a. From your ServiceNow instance, navigate to **Software Asset** > **Software Asset Workspace**.
   The Software Asset Workspace launches in a new tab.

   b. From the side navigation menu of the Software Asset Workspace, select **License usage**.
   The License usage view opens.

   c. On the **Publishers** tab of the License usage view, select **Roadmunk** from the list of available publishers.
   The Roadmunk publisher overview opens.

   d. Select the **Removal Candidates** related list to view the list of available removal candidates.

   e. Take note of the removal candidates that you want to reclaim the user subscription for.
   Save this information for later use.

2. Deactivate the associated users on your Roadmunk account.
   Based on the list of removal candidates that you identified in step 1, you can reclaim user subscriptions by deactivating the associated users on your Roadmunk account.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. From a web browser, open Roadmunk.

b. Log in using your Account Admin credentials.
The Roadmunk dashboard opens.

c. On the side navigation menu of the Roadmunk dashboard, select your profile icon and then select **Account Settings**.
Your account settings appear.

d. On the page header of your account settings, select the **Users** tab.
This tab displays the complete lists of users on your Roadmunk account, including collaborators, reviewers, and inactive users.

e. Select the **Active** toggle button for every user that you want to deactivate.

f. Select **Save**.

The users are deactivated and added to the list of inactive users.

Note: By default, the Roadmunk Download Subscriptions subflow within the ServiceNow SaaS License Management Roadmunk integration downloads all users in your Roadmunk account, including both active and inactive users. To download only the active users in your account, you must download your Roadmunk User Report and then attach it to the Roadmunk integration profile on your ServiceNow instance. See step 7 of Create a Roadmunk integration profile for detailed instructions.

3. **Optional:** Delete deactivated users from your Roadmunk account.
If a deactivated user is no longer part of your organization or team, you can delete the user from your Roadmunk account.

Warning: Users are deleted permanently. Proceed with caution, as users can't be restored once deleted.

a. On the same **Users** tab of your Roadmunk account settings, select **INACTIVE USERS**.
The list of inactive users opens.

b. Select the Remove icon for the user that you want to delete.
The removal confirmation dialog box appears.

c. In the dialog box, select **Delete**.
The user is deleted from your account and all roadmaps are unassigned from the user.

Note: The user isn't notified about being deleted from your account. Any comments that either mention or are made by the user are updated to indicate that the user has been deleted. All roadmaps that are owned by the user are retained in your account and can be managed by any Account Admin. You can view these roadmaps at any time in the All Roadmaps list on the Roadmaps home page. If the user is invited back to Roadmunk under the same email address, you must manually reassign these roadmaps to the user.

d. Repeat steps b and c for each user that you want to delete.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Return to your ServiceNow instance to update the state of each removal candidate to **Closed Skipped**.

   a. From your ServiceNow instance, navigate to **Software Asset** > **Software Asset Workspace**.
   The Software Asset Workspace launches in a new tab.

   b. From the side navigation menu of the Software Asset Workspace, select **License usage**.
   The License usage view opens.

   c. On the **Publishers** tab of the License usage view, select **Roadmunk** from the list of available publishers.
   The Roadmunk publisher overview opens.

   d. Select the **Removal Candidates** related list.

   e. From the list of available removal candidates, select the removal candidate number (RCCxxxxxxx) for a user that you deactivated in step 2.

   f. On the Removal Candidate form, update the state of the removal candidate by selecting **Closed Skipped**.
   Software Asset Management removes the user subscription from the Software Subscriptions [samp_sw_subscription] table.

   g. Close the tab for the Removal Candidate form.

   h. Repeat steps e through g for each Roadmunk user that you deactivated.

Create a child alias to set up multiple integration profiles

Create a child alias to set up multiple integration profiles with unique connections and manage different configurations for each integration profile.

Before you begin

Role required: sam_integrator

Procedure

1. Create an integration profile.
   For more information about creating an integration profile, see Integrate with SaaS applications.
2. Open the connection & credential record set on the integration profile.
   If the **Parent Alias** field on an alias is empty, then the alias is a parent. If the field is filled, then the alias is a child of the alias specified in the **Parent Alias** field.
   - If the record is a parent alias, select the **Child Aliases** tab.
   - If the record is a child alias, select the **Parent Alias** record and then select the **Child Aliases** tab.
3. Select **New**.

   Tip: If the **New** button isn't visible, change the scope to the respective application of the alias from the application scope.

4. Reload the Connection & Credential Aliases page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. On the new child alias form that opens up, provide a name of your choice for the alias.
6. Select **Submit**.
7. Open the child alias record that you created, select **Create New Connection & Credential**.
8. Configure the connection and credential in the same way that you have done for the parent integration.
9. After the connection is configured, return to the integration profile and then select the newly created child alias on the **Connection & Credential** field.
10. Select **Save** and publish the integration profile.

Create a child alias to set up multiple Cisco Webex integration profiles

Create a child alias to set up multiple Cisco Webex integration profiles.

Before you begin

Role required: sam_integrator

Procedure

1. Create a Cisco Webex integration profile.
   For more information about creating an integration profile, see Integrating with Cisco Webex.
2. Open the connection & credential record set on the integration profile.
3. Open the parent alias record (sn_cisco_teams_spk.CiscoWebexTeams).
4. Set the configuration template to the appropriate template based on the selected process in the profile.

Process selected on the profile	Configuration template
Both **Download activity** and **Reclaim subscriptions** check boxes are selected	Webex Subscription Activity and Reclaim
Only **Download activity** check box is selected	Webex Subscription and Activity
Only **Reclaim subscriptions** check box is selected	Webex Subscription and Reclaim
Both **Download activity** and **Reclaim subscriptions** check boxes aren't selected	Webex Subscription

5. Save the parent alias record.
6. Select the **Child Aliases** tab.
7. Select **New**.

   Tip: If the **New** button isn't visible, change the scope to the respective application of the alias from the application scope.

8. Reload the Connection & Credential Aliases page.
9. On the new child alias form that opens up, provide a name of your choice for the alias.
10. Select **Submit**.
11. Open the child alias record that you created, select **Create New Connection & Credential**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

12. Configure the connection and credential in the same way that you have done for the parent integration.
13. After the connection is configured, return to the integration profile and then select the newly created child alias on the **Connection & Credential** field.
14. Select **Save** and publish the integration profile.

Create a child alias to set up multiple Confluence Cloud integration profiles

Create a child alias to set up multiple Confluence Cloud integration profiles.

Before you begin

Role required: sam_integrator

Procedure

1. Create a Confluence Cloud integration profile.
   For more information about creating an integration profile, see Integrating with Confluence Cloud.
2. Open the connection & credential record set on the integration profile.
3. Open the parent alias record (sn_conflunce_spoke.Confluence_Cloud).
4. Set the configuration template to the appropriate template based on the selected process in the profile.

Process selected on the profile	Configuration template
Both **Download activity** and **Reclaim subscriptions** check boxes are selected	Confluence Subscription Activity and Reclaim
Only **Download activity** check box is selected	Confluence Subscription and Activity
Only **Reclaim subscriptions** check box is selected	Confluence Subscription and Reclaim
Both **Download activity** and **Reclaim subscriptions** check boxes aren’t selected	Confluence Subscription

5. Save the parent alias record.
6. Select the **Child Aliases** tab.
7. Select **New**.

   Tip: If the **New** button isn't visible, change the scope to the respective application of the alias from the application scope.

8. Reload the Connection & Credential Aliases page.
9. On the new child alias form that opens up, provide a name of your choice for the alias.
10. Select **Submit**.
11. Open the child alias record that you created, select **Create New Connection & Credential**.
12. Configure the connection and credential in the same way that you have done for the parent integration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

13. After the connection is configured, return to the integration profile and then select the newly created child alias on the **Connection & Credential** field.
14. Select **Save** and publish the integration profile.

Create a child alias to set up multiple Jira integration profiles

Create a child alias to set up multiple Jira integration profiles with unique connections and manage different configurations for each integration profile.

Before you begin

Role required: sam_integrator

Procedure

1. Create a Jira integration profile.
   For more information about creating an integration profile, see Integrating with Jira Software Cloud.
2. Open the connection & credential record set on the integration profile.
3. Open the parent alias record (sn_jira_spoke.Jira).
4. Set the configuration template to the appropriate template based on the selected process in the profile.

Process selected on the profile	Configuration template
Both **Download activity** and **Reclaim subscriptions** check boxes are selected	Jira Subscription Activity and Reclaim
Only **Download activity** check box is selected	Jira Subscription and Activity
Only **Reclaim subscriptions** check box is selected	Jira Subscription and Reclaim
Both **Download activity** and **Reclaim subscriptions** check boxes aren't selected	Jira Subscription

5. Save the parent alias record.
6. Select the **Child Aliases** tab.
7. Select **New**.

   Tip: If the **New** button isn't visible, change the scope to the respective application of the alias from the application scope.

8. Reload the Connection & Credential Aliases page.
9. On the new child alias form that opens up, provide a name of your choice for the alias.
10. Select **Submit**.
11. Open the child alias record that you created, select **Create New Connection & Credential**.
12. Configure the connection and credential in the same way that you have done for the parent integration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

13. After the connection is configured, return to the integration profile and then select the newly created child alias on the **Connection & Credential** field.
14. Select **Save** and publish the integration profile.

Associate a user with subscription records

If the **User** field in the Software Subscription [samp_sw_subscription] table is empty, map the field with an associated user in the User [sys_user] table within ServiceNow AI Platform.

Before you begin

ServiceNow Role required: sam_admin or sam_integrator

Important: sam_user can view the user resolution rules but not create them.

Review the list of unresolved subscriptions on the Subscriptions without user page in the License operations view. Note the User principal name value for the subscription and then verify if this value matches any entry in the User [sys_user] table. If no match is found, configure the rule accordingly.

About this task

SaaS integrations create subscription records in the Software Subscription [samp_sw_subscription] table with fields populated by automated jobs and integrations. By default, the **User** field is resolved by matching the User principal name column value with the **Email** and **User ID** fields in the User [sys_user] table. To accurately map user data when user data isn't resolved, create a user resolution rule.

Procedure

1. Navigate to **Workspaces** > **Software Asset Workspace** > **License operations** > **User subscription** > **User resolution rules**.
2. Select **New**.
3. On the form, fill in the fields.

   For a description of the field values, see User resolution rule fields.
4. Select **Save**.

Result

If the user resolution rule is correctly configured and the Download subscription job *SAM - Refresh <profile name> Subscriptions* runs successfully, the unresolved subscription you targeted is cleared from the Subscriptions without user page in License operations view.

Trouble?

If you find multiple records with the same email address but different User IDs and associated user classes, enable the system property *sn_itam_samp.user_resolution_exclude_table*. Provide a list of comma-separated table names that extend the User [sys_user] table to exclude them from user resolution. After making these changes, rerun the Download Subscription job *SAM - Refresh <profile name> Subscriptions* to associate users with their subscription records.

Disconnect SSO apps

Disconnect an SSO application to stop viewing subscription information for the app, or before creating a direct integration for the app.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sam_integrator

About this task
SaaS License Management offers direct integrations with select applications. Direct integrations provide the most robust usage data. For a list of available direct integrations, see Integrate with SaaS applications. If you have a connected SSO app and want to replace it with a direct integration, disconnect the app before creating the direct integration to avoid creating duplicate subscription records for the app.

When an app is disconnected, all SSO subscriptions for the app are deleted and any open reclamation candidates are set to Closed Skipped.

Procedure
1. Navigate to **All** > **SaaS License** > **SSO Applications**.
2. Click the application you want to disconnect.
3. Click **Disconnect**.

> **Tip:** You can also disconnect multiple apps at once from the **SSO Applications** list. Select the apps using the check box on the left side of the list. At the bottom of the list, click the **Actions on selected rows** drop down menu and then click **Disconnect**.

Delete an integration profile

If your company stops using a SaaS application or SSO provider, you can delete the integration profile.

To delete an integration profile, navigate to the integration profile record and click **Delete**. The sam_integrator role is required to delete integration profiles.

Direct integrations

When you delete a direct integration profile, all subscriptions, scheduled jobs, and consumption summaries for the integration are also deleted. Open reclamation candidates are updated to Closed Skipped. Reclamation rules are not deleted.

SSO integrations

When you delete an SSO integration profile, all SSO applications, subscriptions, and scheduled jobs for the integration are also deleted. Open reclamation candidates are updated to Closed Skipped. Reclamation rules are not deleted.

An SSO integration is created using a directory integration. When you delete an SSO integration profile, the directory integration (including directory jobs, directory users, and directory groups) is not deleted. Before deleting a directory integration, make sure it is not being used by additional connections, such as Microsoft Azure AD integration for new hire onboarding. The sn_remote_dir_sync.admin role is required to delete directory integrations.

Subscription identifiers for SaaS and SSO applications

Use the SaaS License Management application to view, manage, and resolve subscription identifiers for your SaaS and SSO applications.

Subscription identifiers uniquely identify your SaaS and SSO applications. Each subscription identifier is associated with a discovery map and software model that help to normalize the software that is installed in your environment. You can use this information to track your software subscriptions and understand your license positions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Manage updated subscription identifiers

Keep your SaaS and SSO license positions accurate and up to date by managing the updated subscription identifiers that are detected by the ServiceNow AI Platform.

Before you begin

Role required: sam_integrator or admin

About this task

When a SaaS or SSO provider updates an existing subscription identifier, the ServiceNow AI Platform automatically detects and pushes the changes to your ServiceNow instance through twice a week content updates. Changes include the product name, edition, version, platform, and language. Your instance uses this information to update subscription identifiers on existing software models, which can help prevent the creation of multiple software models for the same subscription software.

Subscription identifiers update either automatically or manually depending on the associated software model type. If a subscription identifier is associated with an auto-generated software model, it updates automatically. If a subscription identifier is associated with a customized software model, you must update it manually using software model suggestions. Software model suggestions identify changes to your existing subscription identifiers. You can use this information to determine whether you should update your customized software models based on the latest subscription identifiers. For example, if a SaaS provider updates the product name for an application, the software model suggestions identify both the current and updated values of the product name. If the changes are correct, you can accept the software model suggestions to update your software model with the latest product name.

Note: The navigation mentioned in the following procedure is in the Core UI and is available when the Software Asset Workspace isn't installed.

Procedure

1. Navigate to **All** > **SaaS License** > **Software Models**.
2. Select a software model that is marked with a dot.
   A dot indicates that there are discrepancies between the associated subscription identifier and data that is provided in the latest content updates.
3. On the Software Model form, open the software model suggestions by clicking the warning icon next to the **Display name** field.
   The Software Model Suggestions dialog box opens.
4. In the dialog box, view the **Suggested discovery map** field to verify that your software model is using the discovery map for the updated subscription identifier.
   This field is read-only. However, you can select the preview icon ⓘ to view additional information about the discovery map.
5. Verify the changes to the subscription identifier.

   The Software Model Suggestions dialog box displays both the current and updated values of all subscription identifier fields. Although these fields are read-only, you can compare the values to understand how the subscription identifier has changed. Use this information to determine whether the changes are correct and should be applied to your software model.

Subscription identifier fields

Field	Description
Suggested publisher	Updated software publisher.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Publisher	Current software publisher.
Suggested product	Updated software product name.
Product	Current software product name.
Suggested Version condition	Updated qualifier that you can use to compare the value of the software model **Version** field against the value of the discovery model **Version** field. Your instance uses qualifiers such as **is** or **is anything** to determine whether your discovered software applies to the software model.
Version condition	Current qualifier that you can use to compare the value of the software model **Version** field against the value of the discovery model **Version** field. Your instance uses qualifiers such as **is** or **is anything** to determine whether your discovered software applies to the software model.
Suggested version	Updated software version.
Version	Current software version.
Suggested Edition condition	Updated qualifier that you can use to compare the value of the software model **Edition** field against the value of the discovery model **Edition** field. Your instance uses qualifiers such as **is** or **is anything** to determine whether your discovered software applies to the software model.
Edition condition	Current qualifier that you can use to compare the value of the software model **Edition** field against the value of the discovery model **Edition** field. Your instance uses qualifiers such as **is** or **is anything** to determine whether your discovered software applies to the software model.
Suggested edition	Updated software edition.
Edition	Current software edition.
Suggested Platform condition	Updated qualifier that you can use to compare the value of the software model **Platform** field against the value of the discovery model **Platform** field. Your instance uses qualifiers such as **is** or **is anything** to determine whether your discovered software applies to the software model.
Platform condition	Current qualifier that you can use to compare the value of the software model **Platform** field against the value of the discovery model **Platform** field. Your instance uses qualifiers such as **is** or **is anything** to determine whether your discovered software applies to the software model.
Suggested platform	Updated platform on which you can install or run the software.
Platform	Current platform on which you can install or run the software.
Suggested Language condition	Updated qualifier that you can use to compare the value of the software model **Language** field against the value of the discovery model **Language** field. Your instance uses qualifiers such as **is** or **is anything** to determine whether your discovered software applies to the software model.
Language condition	Current qualifier that you can use to compare the value of the software model **Language** field against the value of the discovery model **Language** field. Your instance uses qualifiers such as **is** or **is anything** to determine whether your discovered software applies to the software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Suggested language	Updated language in which you want to run the software.
Language	Current language in which you're running the software.

6. Accept or reject the changes.
   - If the changes are correct, select **Accept** to update the software model with the suggested field values.
   - If the changes are not correct, select **Reject** to ignore the suggested field values. The software model continues to use the existing subscription identifier.

   You automatically return to the Software Model form.
7. Select **Update** to save your changes and clear the software model suggestions.

Resolve unrecognized subscription identifiers

Maintain accurate license positions for your subscription software by resolving unrecognized subscription identifiers that are detected by the ServiceNow AI Platform.

Before you begin

Role required: admin

About this task

The ServiceNow AI Platform marks a subscription identifier as unrecognized when it is not associated with a software model. By associating the unrecognized subscription identifier with a software model, you can track subscription usage for the associated subscription software.

Note: The navigation mentioned in the following procedure is in the Core UI and is available when the Software Asset Workspace isn't installed.

Procedure

1. **Optional:** Send unrecognized subscription identifiers back to the ServiceNow content team by opting in to the Software Asset Management content service.
   When you opt in to the Software Asset Management content service, verify that the **Unrecognized Subscription Identifier** KPI is enabled. See Enable sharing information with Software Asset Management content service for detailed instructions.
2. Navigate to **SaaS License** > **Unrecognized Subscription Identifiers**.
3. Select an unrecognized subscription identifier.
4. On the form, fill in the fields.

Unrecognized Subscription Identifier form

Field	Value
Subscription identifier	Name of the unrecognized subscription identifier. This field populates automatically.
Software model	Software model that you want to associate with the subscription identifier.
Subscription profiles	Direct integration profiles that are associated with the subscription identifier. This field populates automatically.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Number of subscriptions	Number of subscriptions that are associated with the subscription identifier. This field populates automatically.
Exclude from content service	Option that prevents your ServiceNow instance from sending the unrecognized subscription identifier back to the ServiceNow content team. This option is applicable only if you opted in to the Software Asset Management content service.

5. Select **Update**.

Result
After the subscription identifier associates with the specified software model, all related software subscriptions automatically update with that software model.

If you opted to share your unrecognized subscription identifier data with ServiceNow, your ServiceNow instance sends the unrecognized subscription identifier back to the ServiceNow content team. The content team can use this information to further research and improve the normalization process.

Subscription exclusions for SaaS and SSO applications

Define subscription exclusions for your SaaS and SSO applications to optimize your licensing costs by keeping the excluded subscriptions out of license cost calculations.

You can keep certain low-value and high-volume user subscriptions from being charged during the Software Asset Management application's licensing calculations. You can define two types of subscription exclusions: Identifier-based exclusions and User-based exclusions.

Important: Identifier-based exclusions are specific to individual subscription profile types, whereas User-based exclusions apply across all SaaS integration profiles.

Define identifier-based exclusions for SaaS and SSO applications

Define exclusions for your subscription identifiers to keep them excluded from the Software Asset Management application's license calculations. Subscription identifiers uniquely identify your SaaS and SSO applications.

Before you begin
Role required: sam_admin

About this task
Subscription identifiers help you track your software subscriptions and understand your license calculations. You can optimize your licensing costs by defining subscription identifier-based exclusions so that these identifiers aren't included while calculating your licensing costs.

Note: If you're using the Software Asset Workspace, the option to navigate to the integration profile in Core UI is inactive.

Procedure
1. Navigate to the integration profile.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Software Asset Workspace	Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**.

2. Select an integration profile for which you're defining an identifier-based exclusion.
3. Select the Subscription Identifier Exclusion Rule related list.
4. Select **New**.
5. On the form, fill in the fields.

Subscription Identifier Exclusion Rule form

Field	Description
Subscription identifier	The subscription identifier for which you're creating the exclusion rule.
Profile type	Type of integration profile.
Domain	Domain to which the data belongs.
Active	The option when the exclusion rule is active.

6. Select **Save**.

Result
The identifier-based exclusion rule is created for the subscription identifier. The specified subscription identifier remains excluded when the scheduled job is executed for license calculations.

Define user-based exclusions for SaaS and SSO applications

Define exclusions for certain user subscriptions to keep them excluded from the Software Asset Management application's license calculations.

Before you begin
Role required: sam_admin

About this task
You can create subscription user exclusion rules so that these user subscriptions aren’t included while calculating your licensing costs. The exclusion rules for these user subscriptions help you optimize your licensing costs.

Procedure
1. Navigate to the integration profile.

Interface	Action
Core UI	Navigate to **All** > **Software Asset** > **SaaS License** > **Direct Integration Profiles**.
Software Asset Workspace	Navigate to **License operations** > **User Subscriptions** > **Direct integration profiles**.

2. Select an integration profile for which you're defining a user-based exclusion.
3. Select the Subscription User Exclusion Rule related list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Select **New**.
5. On the form, fill in the fields.

Subscription User Exclusion Rule form

Field	Description
User principal name	User name or email address of the user.
Profile type	Type of integration profile. This field is not visible in the default view. You can add this field to the form using the custom view.
Domain	Domain to which the data belongs.
Active	The option when the exclusion rule is active.

6. Select **Save**.

Result
The user-based exclusion rule is created for the subscription identifier. The specified subscription identifier remains excluded when the scheduled job is executed for license calculations.

Software Spend Detection

Use the Software Spend Detection feature to track, analyze, and optimize software spending from imported financial data.

With Software Spend Detection, you can:

- Streamline business processes and reduce costs by consolidating software products with similar functionality.
- Reinforce company software purchasing policies by viewing all software purchased in each department.
- Start managing any unmanaged software by creating software models and entitlements with Software Asset Management.

Important: Starting with Brazil release, the Software Spend Detection feature is no longer available in the Core UI. Existing imports and spend transactions that were created using the Core UI are preserved and available in the Software Asset Workspace. The Software Spend Detection Overview dashboard is also deprecated.

The Software Spend Detection feature is available in the Software Asset Workspace under **License operations**.

Related topics

License operations view

Request Software Spend Detection

Request Software Spend Detection to track, analyze, and optimize software spending. To access Software Spend Detection, enable the Software Asset Management - Spend Detection (com.sn_sam_spend) plugin. This plugin includes demo data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

- Sign the Software Spend Detection legal agreement. For more information, contact your ServiceNow account representative.
- Activate the Software Asset Management Professional (com.snc.samp) plugin on your ServiceNow instance. For more information, see Request Software Asset Management.
- Install the Software Asset Workspace (sn_sam_workspace) app from the ServiceNow Store.
- Optional: To use AI-powered classification and normalization, install the ServiceNow Otto for Software Asset Management (SAM) (sn_now_assist_sam) app from the ServiceNow Store. Without this app, Software Spend Detection uses the machine learning pipeline. For details, see AI-powered software spend detection.

Note: Software Spend Detection is not supported for on-premises users hosting their own ServiceNow instance.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Select **Request plugin** to open the **Activate Plugin** form on Now Support.
3. On the **Activate Plugin** form, provide the following information.

Activate Plugin form

Field	Description
What is your target instance	Select the instance that you want to activate the plugin on.
Which plugin would you like to activate	Select the name of the plugin to activate. **Note:** If the system doesn't list the plugin you want or if you're activating the plugin on an OEM or on-premise instance, select the **Plugin I'm looking for is not listed** check box and then enter the name of the plugin.
Select Maintenance Date and Time	Select the date and time to activate the plugin.

Example

For example, see the following form to activate the Event Management plugin on an instance named SNC Instance.

4. Select **Submit**.
After the maintenance window, the system installs the plugin on your instance. To confirm the installation, go to the Installed tab in the Application Manager.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Managing software spend in the Software Asset Workspace

The Software Spend Detection feature is available in the Software Asset Workspace under License operations. Use Software Spend Detection in the Software Asset Workspace to import financial transactions, review labeled transactions, and track software spending across your organization.

> **Important:** Starting with the Brazil release, the Software Spend Detection feature is no longer available in the Core UI. Existing imports and spend transactions that were created using the Core UI are preserved and available in the Software Asset Workspace. The Software Spend Detection Overview dashboard is also deprecated.

The Software Asset Workspace provides a unified experience for managing your software spend detection activities. Under **License operations**, the **Software spend detection** section contains two submodules that support the end-to-end spend detection workflow.

Transaction imports

Record of every import job with its status and results.

All transactions

Consolidated list of every spend transaction in the system, regardless of import source or state.

Transaction imports

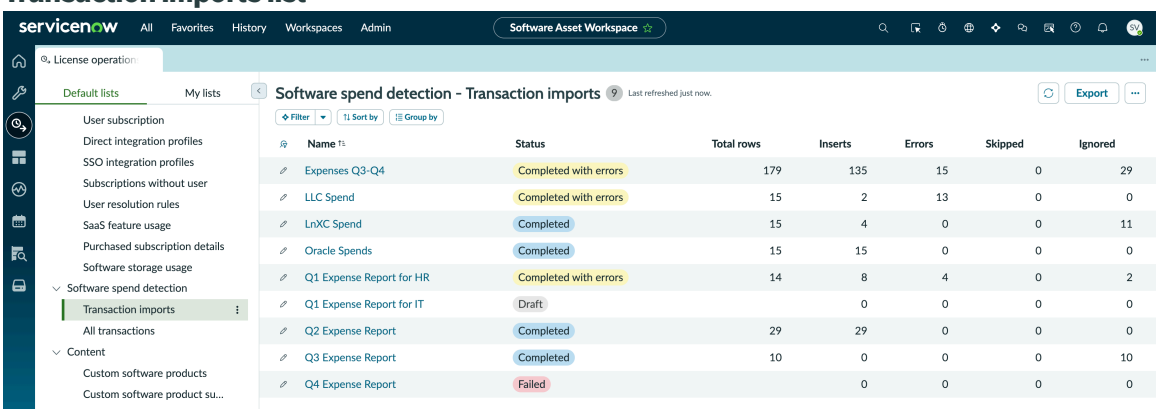
The **Transaction imports** list shows every import record created in Software Spend Detection. Each row shows the import name, its status, and the row counts for inserts, errors, updates, skipped rows, and ignored rows.

Use this list to monitor the outcome of an import, identify imports that completed with errors, and locate the transactions created by a specific import. Select any record to open the import and review its details, including the file that was uploaded and the transactions the import created.

Selecting an import from the list opens its record with a **Transactions** tab showing every transaction created by that import. If an import contains rows that failed to process, an **Errors** tab also appears with the source row number, error message, and the original values from the file.

To start a spend transaction import, see Import financial transactions.

Transaction imports list



All transactions

The **All transactions** list shows every spend transaction that has been imported or manually created in the Software Asset Workspace. Use this list to review the state of each transaction, verify how it was labeled, and identify transactions that require correction.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Each row shows the transaction details from your source data along with the values assigned during labeling, such as the publisher, product, software indicator, and labeling method. Values assigned by AI, machine learning, or a user are visually distinct, so you can quickly identify which transactions need review.

The following two fields on the transaction record help you identify software purchases that aren't yet tracked in your Software Asset Management Content Library:

- **Is software**: Indicates whether the transaction represents a software purchase.
- **Is managed**: Indicates whether the software is already tracked in your Software Asset Management Content Library with an active software model.

Transactions where **Is software** is true and **Is managed** is false represent unmanaged software spend.

The **State** field indicates where each transaction is in the labeling process.

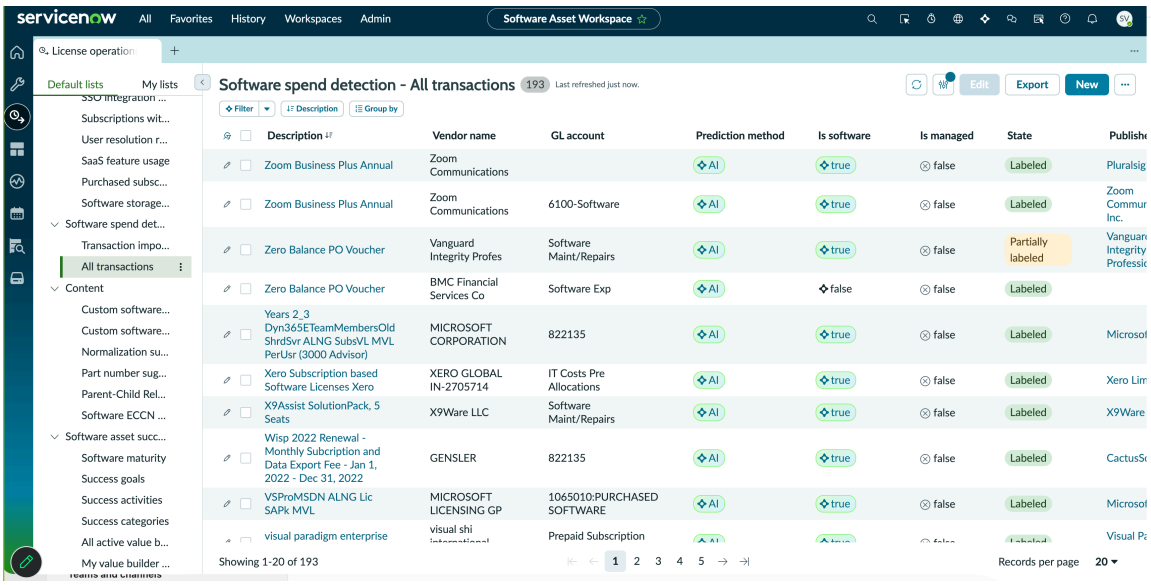
State field values

Value	Description
New	Default state assigned when a transaction is imported or manually created.
Labeled	The transaction is classified as a software purchase, and both the publisher and product are matched to existing records.
Partially labeled	The transaction is classified as a software purchase, and the publisher is matched, but the product isn't.
Manually labeled	A user manually set or updated the **Is software**, **Publisher**, or **Product** fields on the transaction.
Unlabeled	The labeling process couldn't classify or normalize the transaction after the maximum retry attempts.

For details on how each state is assigned, see AI-powered software spend detection.

To manually create a spend transaction, see Create a spend transaction manually.

All transactions list



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

- Import financial transactions
- Create a spend transaction manually
- AI-powered software spend detection

AI-powered software spend detection

AI-powered spend detection identifies software purchases in imported spend transactions and normalizes the derived raw publisher and raw product to existing publisher and product records in Software Asset Management Content Library. This automation improves spend reporting accuracy and reduces manual classification effort.

When the ServiceNow Otto for Software Asset Management (SAM) store app (sn_now_assist_sam) is installed, imported spend transactions are processed by two AI skills: the Spend transaction software classification skill and the Spend transaction software normalization skill. These AI skills improves classification accuracy for new software products and publishers, then links each software transaction to existing publisher and product records.

How the AI-powered pipeline works

After a spend transaction import completes, the *SAM - Label Spend Transactions* scheduled job runs the imported transactions through the following AI skills:

Spend transaction software classification skill

Analyzes the vendor name, description, and GL account for each transaction to identify whether it represents a software purchase. For transactions identified as software, the skill also extracts the publisher and product.

Spend transaction software normalization skill

Matches the extracted publisher and product to the existing records in the Software Asset Management Content Library. This linking supports accurate spend reporting and license position tracking.

For more details, see Classify and normalize software spend transactions by using ServiceNow Otto for Software Asset Management (SAM) and Skill inputs and triggers for ServiceNow Otto for Software Asset Management (SAM).

Transactions not identified as software are not processed by the Spend transaction software normalization skill.

Note: If the ServiceNow Otto for Software Asset Management (SAM) store app isn't installed or either AI skill is inactive, the *SAM - Label Spend Transactions* job uses the existing machine learning pipeline instead.

How transactions move through the labeling pipeline

The *SAM - Label Spend Transactions* scheduled job updates the **State**, **Is software**, and **Is managed** fields on the Software Spend Transactions [sam_spend_transaction] table for each transaction based on the outcome of the classification and normalization skills.

The **State** field reflects the pipeline outcome for each transaction:

New

Default state when a transaction is imported or manually created. A transaction stays in New if the pipeline exhausts the maximum number of retry attempts without reaching a terminal state.

Labeled

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The classification skill identified the transaction as a software purchase, and the normalization skill matched both the publisher and product to existing records in the Software Asset Management Content Library.

Partially labeled

The classification skill identified the transaction as a software purchase, and the normalization skill matched the publisher, but not the product, to an existing record in the Software Asset Management Content Library. The **Is software** field is set to true.

Unlabeled

The pipeline couldn't classify or normalize the transaction after the maximum number of retry attempts.

Manually labeled

A user manually set or updated the **Is software**, **Publisher**, or **Product** fields on the transaction.

When the classification skill identifies a transaction as a non-software purchase, the **Is software** field is set to false, and the transaction bypasses the normalization skill.

After a transaction reaches the Labeled or Partially labeled state, the **Is managed** field is evaluated. When a matching software model exists in your Software Asset Management Content Library for the normalized publisher and product, the **Is managed** field is set to true.

The maximum number of retry attempts is controlled by the *samp.spend_prediction_service.max_label_attempts* system property, which defaults to 3. You can update this property at any time. For more details, see Software Asset Management properties.

AI activity log

Track how many software transactions are processed by the AI pipeline using the **AI activity log** card. This card shows a rolling count of transactions from the Software Spend Transactions [sam_spend_transaction] table where the prediction method is AI, the transaction is a software purchase, and the state is Labeled or Partially labeled.

To access the card, go to **Software Asset Workspace** > **Software asset overview**. The card appears under the **Activity center** section.

Related topics

- Managing software spend in the Software Asset Workspace
- AI in Software Asset Management
- Skill inputs and triggers for ServiceNow Otto for Software Asset Management (SAM)
- Generative AI skills in ServiceNow Otto for Software Asset Management (SAM)

Opt in to Content Service

Opt in to Content Service for Software Spend Transactions to get more accurate predictions in Software Spend Detection by sharing financial transaction data with the ServiceNow Content Service team.

Before you begin
Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Opting in to Content Service for Software Spend Transactions means that you agree to have a copy of your financial transaction data securely sent to ServiceNow. Your data is used only to improve future publisher and product predictions when importing data into Software Spend Detection. You can opt out of Content Service at any time.

If you already opted in to Software Asset Management Content Service, you still need to manually enable data sharing for Software Spend Detection by selecting the Software Spend Transactions toggle button on the Content Service Setup page. Software Spend Transactions data sharing is disabled by default.

If you opt in after you've already imported data into Software Spend Detection, data from previous imports is shared as well as data from future imports.

Note: If you want to hide the ability to opt in, a user with the admin role can set the glide.samp.spend_detection_opt_in.enabled system property to *false*. Setting this value to *false* hides the toggle button used to turn on sharing for software spend transactions. Also, if this property is set to *false* when you're already opted in, your transaction data is no longer shared.

Procedure

1. Navigate to **All** > **Software Asset** > **Content Service Setup**.
2. Select the check the box to accept the opt-in agreement and then select **Opt-in**.

   Note: If you already opted in to Content Service through Software Asset Management, you don't see the opt-in screen.

   Data sharing for Software Discovery Models, Software Model Lifecycles, Part Numbers and Discovery Maps, and Processor Names KPIs is automatically enabled after opting in. If you don't want to share data for some KPIs, individually disable sharing by selecting the toggle button next to the KPI and then selecting **Save**. For more information about Content Service KPIs, see Software Asset Management Content Service.
3. To turn on sharing for software spend transaction data, select the toggle button next to Software Spend Transactions and then select **Save**.

What to do next

You can return to the Content Service Setup page to adjust your data sharing settings for each KPI. You can completely opt out by selecting **I would like to opt my company out of the Software Asset Management Content Service Program**. After opting out, you can opt back in at any time.

Content Service for Software Spend Detection

Opt in to Software Asset Management Content Service for Software Spend Transactions to get more accurate predictions in Software Spend Detection by sharing financial transaction data with the ServiceNow Content Service team.

Opting in to Content Service for Software Spend Transactions means that you agree to have a copy of your financial transaction data securely sent to the ServiceNow Content Service team. ServiceNow uses your data only to improve future publisher and product predictions when importing data into Software Spend Detection. ServiceNow protects all data using the same policies that protect customer instances.

Opting-in shares the following data with ServiceNow:

- Vendor name
- Transaction description

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- GL account
- Prediction results (Publisher ID, Product ID, Is Software)

Your data is sent anonymously to the Content Service team. Your data isn't linked to any identifiable information, such as company or instance name. Before importing data, it's your responsibility to ensure that the fields **Vendor name**, **Transaction Description**, and **GL account** don't contain any identifiable information such as company or employee names.

The ServiceNow Content Service team uses these data points to improve machine learning models used by ServiceNow Artificial Intelligence (AI) Services. The AI Services are a set of web services that reside within every ServiceNow datacenter. All Software Spend Detection users benefit from continual improvements to ServiceNow AI Services, but users who are opted-in to Content Service benefit the most. ServiceNow AI Services learns how to identify software products and publishers in your transactions that Software Spend Detection previously was not able to identify. This learning improves the functionality for your future imports.

You can opt out of Content Service at any time. If you opt out, no data from future imports is sent to the ServiceNow Content Service team, but your previously shared data is not deleted. If you would like to participate in Content Service but exclude some transactions from being shared with ServiceNow, you can select the **Exclude from content service** check box on those transaction records.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Import financial transactions

Import a Microsoft Excel spreadsheet of financial transaction data in the Software Asset Workspace to start managing software spending.

Before you begin

Have your financial transaction data ready, including vendor name, transaction description, amount, and GL account for each transaction.

Note: To use the AI pipeline for classifying imported transactions, install the ServiceNow Otto for Software Asset Management (SAM) store app. Without this store app, transactions are processed by the machine learning pipeline. For details, see AI-powered software spend detection.

Role required: sam_user

About this task

Import financial transactions to gain visibility into software spending across your organization. After the import, the *SAM - Label Spend Transactions* scheduled job classifies each transaction as software or non-software and links software transactions to publisher and product records in your Content Library. Use the classified data to track software spending, identify unmanaged purchases, and improve license position accuracy.

Procedure

1. Go to **Software Asset Workspace** > **License operations** > **Software spend detection** > **Transaction imports**.
2. Select **New**.
3. On the **Create New Software spend transaction import** form, enter a name for the import in the **Name** field.
4. Select **Download template**.
   The template downloads as a Microsoft Excel (.xlsx) file.
5. Open the downloaded template and populate it with your financial transaction data.
   Include a value in each required column. For accurate classification results, include a GL (General Ledger) account for every transaction.
6. Return to the **Create New Software spend transaction import** form and select **Attach file** to upload the completed template.
7. Select **Import**.

   The import runs and the status updates based on the outcome, such as **Completed**, **Completed with Errors**, or **Error**.

   The *SAM - Label Spend Transactions* scheduled job runs in the background, using the vendor name, description, and GL account to classify each transaction as a software or non-software purchase. For details, see AI-powered software spend detection.

What to do next

After the import completes, review the results and manage your transactions. To see the row counts for every import, navigate to **Software Asset Workspace** > **License operations** > **Software spend detection** > **Transaction imports**. The list view shows the total rows processed, skipped, ignored, and errored for every import. To review the transactions or errors created by a specific import, open the import record from the Transaction imports list. For details on the tabs available on an import record, see Managing software spend in the Software Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To review individual transaction records across all imports, navigate to **Software Asset Workspace** > **License operations** > **Software spend detection** > **All transactions**. The list view shows every transaction record along with its assigned values.

Related topics

- Classify and normalize software spend transactions by using ServiceNow Otto for Software Asset Management (SAM)
- Managing software spend in the Software Asset Workspace
- Create a spend transaction manually

Create a spend transaction manually

Create spend transactions for one-off software purchases or spend records that are not captured in your accounts payable import file. This allows you to track all software spending in one location.

Before you begin

Role required: sam_user

About this task

The *SAM - Label Spend Transactions* scheduled job processes manual transactions during its next run.

Procedure

1. Navigate to **Software Asset Workspace** > **License operations** > **Software spend detection** > **All transactions**.
2. Select **New**.
3. On the **Create New Software spend transactions** form, fill in the fields.
   For a description of the field values, see Software spend transaction fields.
4. **Optional:** If you already know the publisher and product for the transaction, identify it as software on the **Create New Software spend transactions** form.
   Select the **Is software** check box, and then provide values for the **Publisher** and **Product** fields.
5. **Optional:** To exclude this transaction from being shared with the Software Asset Management Content Library team, expand the **More details** section and select the **Exclude from content service** check box.
6. Select **Save**.

   The transaction is created with the **State** field set to **New** and appears in the All transactions list. The *SAM - Label Spend Transactions* scheduled job processes the transaction on its next run.

   If you provided valid values for the **Is software**, **Publisher**, or **Product** fields during creation, the state changes to **Manually labeled** after save. For details on values of the State field, see AI-powered software spend detection.

Related topics

- Import financial transactions
- Managing software spend in the Software Asset Workspace
- AI-powered software spend detection
- Software spend transaction fields

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Installed with Software Spend Detection

User roles and tables are installed with Software Spend Detection. Demo data is available for Software Spend Detection.

User roles

Role	Description
sam_user	Role required to import financial transaction data into Software Spend Detection. Users with this role can view all modules in Software Spend Detection except **Content Service Setup**. Users with this role cannot view Software Asset Management.
sam_admin	Role required to opt in to Content Service Setup for the Software Asset Management application

Tables

Table	Description
Software Spend Transactions [sam_spend_transaction]	Financial transaction data.
Software Spend Transactions Import [sam_spend_transaction_import]	Import summary table showing number of rows imported and any import errors.
Software Spend Transactions Import [imp_sam_spend_transaction]	Staging table for financial transaction data imports.
Overlapping Software Configuration [sam_sw_overlap_configuration]	List of reports shown on the Overlapping Software dashboard.
Overlapping Software Summary [sam_sw_overlap_summary]	List of software products with spend transactions.

Software Asset Management administration

Software Asset Management administration tasks include adding custom part number records and custom license metrics. You can also refresh processor definitions and migrate software installations. Software Asset Management content service can be enabled, and migration procedures are also included.

The sam_admin role is required to configure administrative tasks. However, the sam_user role can view and read configurations.

Software Asset Management job results show the status of discovery model normalization and software usage import jobs.

Software Asset Job Results records are listed in the navigation path **All** > **Software Asset** > **Administration** > **Job Results** (see table for field descriptions).

Software Asset Job Result form

Field	Description
Number	Number of the job result that is generated when the job is run.
Name	Name of the job.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Job Result form (continued)

Field	Description
Status	Status of the job.
Created	Date and time job was created.
Updated	Date and time job was updated.

Enable sharing information with Software Asset Management content service

Opt in to share unnormalized software installation data from your organization with Software Asset Management Content Service. You can opt out at any time.

Before you begin

Role required: sam_admin

About this task

Note: If you are managing a National Security Cloud (NSC) Department of Defense (DOD) Impact Level 5 (IL5) deployment, you cannot share any unnormalized software installation data with ServiceNow even if you opt to participate in the Software Asset Management Content Service. If a software product does not exist in the Software Asset Management Content Library, you can create a software content request for it manually. For detailed instructions, see Create IT Asset Management content request.

Important: If you're using the Software Asset Management application on-premise, you can set up your ServiceNow instance to connect directly to the Content Service. For detailed instructions, see the knowledge base article KB1585263.

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Content Service Setup**.
2. Select **Opt-In Agreement** to read the agreement.
3. After reading the agreement, select **Done**.
4. Select the **Yes, I have read and accept the Opt-In Agreement** check box and then select **Opt-In**.
   After you opt in, the Software Discovery Models, Software Product Lifecycles, Part Numbers and Discovery Maps, Processor Names, and Product License Exception Rules KPIs are automatically enabled. The Custom Software Products KPI is automatically disabled.
5. To enable or disable a KPI, select the toggle button next to the KPI and then select **Save**.
6. To opt out, select **I would like to opt my company out of the Software Asset Management Content Service Program** and then select **Opt-Out**.
   The Software Discovery Models, Software Product Lifecycles, Part Numbers and Discovery Maps, Processor Names, Product License Exception Rules, and Custom Software Products are disabled and your unique normalization content is no longer provided to the Software Asset Management content service.

Related topics

Software Asset Management Content Service

Exclude software assets on CIs

You may want to manage software assets installed on a subset of your configuration items in the Software Asset Management application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sam_admin

About this task
For example, some of your devices may be leased from a third party and you are not responsible for license compliance for the software on those devices. Or, you may want to start with managing software installed on devices only at a specific location (for example the New York office). Then, you can expand to managing software on devices in other locations. Convey to the Software Asset Management application which devices you want to exclude. The system excludes any software installed on these devices in license compliance calculations.

Procedure
1. In the Hardware [cmdb_ci_hardware] table, add a true/false column, for example, Exclude from SAM [u_exclude_from_sam].
2. Set the value of the Exclude from SAM column to true for devices you don't want to manage installed software for in the application.

   Note: The default value of the Exclude from SAM column is false. By default, the system manages installed software on all devices.

3. Navigate to **Software Asset** > **Administration** > **Properties** and then enter the column name, [u_exclude_from_sam], in the field next to the property **Enter the name of the true/false field added to cmdb_ci_hardware table to exclude software installed on selected devices from Software Asset Management**.
   Ensure that you enter the column name without the brackets.
   Once the scheduled job (SAM — Adjust Installs for excluded CIs) runs, the software installed on devices with the Exclude from SAM column set to true are excluded from the application.
4. To start managing software installs on previously excluded devices in the application, set the value of the Exclude from SAM column for the device to false.
   Once the scheduled job (SAM — Adjust Installs for excluded CIs) runs, the system starts managing software installs on these devices.
5. Complete the following steps to start managing the software installs on all previously excluded devices.

   a. Navigate to **Software Asset** > **Administration** > **Properties**.

   b. Delete the column name [u_exclude_from_sam] from the property

   c. Select **Save**.
      Once the scheduled job (SAM — Adjust Installs for excluded CIs) runs, the system starts managing the software installed on all previously excluded devices.

Engineering license servers

View the list of all the license management servers that OpenLM or Open iT connect with to get data into your ServiceNow instance.

You can view information about all the license management servers by navigating to **All** > **Software Asset** > **Administration** > **Engineering License Server**.

Information such as the name of the server, the current status of the server, and the last connection time is displayed in the *Engineering Application License Servers* form layout.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information, see Engineering license management and Engineering License overview dashboard in workspace.

Add a software pattern normalization rule

You can add a pattern normalization rule to normalize specific software products in your environment based on a common pattern.

Before you begin

Role required: sam_admin

About this task

Note: When creating a pattern normalization rule for custom products and publishers, create the custom product and company records first.

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Pattern Normalization Rules** and create a new record (see table for field descriptions).

Pattern Normalization Rule form

Field	Description
Name	Specify a unique name for pattern normalization rule.
Discovered publisher contains	Specify text to search for in the software publisher field.
Discovered product contains	Specify text to search for in the product field.
Active	Option that activates the rule.
Discovered publisher is empty	Option that includes products that have an empty publisher field (the rule applies to discovery models where the publisher is unknown).
Normalized Attributes	
Publisher	Specify the normalized name of the publisher of the software.
Product	Specify the normalized name of the product.
Edition	Specify the product edition.
Product type	Choose the product type. ○ Child: A subcomponent of main software (not licensable). ○ Driver: Software product that controls a device. ○ Licensable: Software product that is licensable.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Not Licensable: Software product that is not licensable. ○ Patch: Software product designed to update, fix, or improve an existing computer program.
Version	Specify the version of the product.
Platform	Choose the platform. ○ Windows ○ macOS ○ UNIX
Language	Choose the language. ○ Dutch ○ English ○ French ○ German ○ Italian ○ Spanish

2. Once the rule is created, to apply the rule so applicable discovery models are normalized without delay, click the **Apply Rule** related link.

Add a software reclamation rule

Add a reclamation rule to aggregate usage records and to identify unused software.

Before you begin

Role required: sam_admin

About this task

If you select the **Notify user** option in the reclamation rule, then the user has a chance to respond with approval during the process of reclamation. If no response is received during a specified period, the software rights are automatically reclaimed. If the user still wants to keep the software installation, it becomes the responsibility of the manager to approve or decline the removal.

For information on creating a reclamation rule for SCCM products, see Create a reclamation rule to import Microsoft SCCM usage data.

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Reclamation Rules**.
2. Select **New**.
3. On the form, fill in the fields.

Note: You can edit the software members of the Software Products list after the reclamation rule is created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reclamation Rules form

Field	Description
Name	Name for the reclamation rule.
Applies to	Item type that the reclamation rule applies to.
Reclamation type	Type of reclamation rule. The possible values are the following: ○ Total Usage Time (default) ○ Last Used Date ○ Peak Concurrent Usage (appears only when you select **Engineering App License** from the Applies to list) ○ Active Transaction Codes (appears only when you select **SAP Named User** from the Applies to list)
Named user type	SAP named user type. This field appears only when you select **SAP Named User** from the Applies to list. **Note:** This field is applicable to only to the SAP publisher.
Create reclamation candidate	When selected, a removal candidate is created for this reclamation rule, in addition to pulling in usage for all the software products associated with this rule. By default, this check box is selected. If you unselect this check box, a removal candidate is not created for this rule, although usage of the software products is still pulled in.
Include no activity	When selected, software products that have installations on devices but don't have usage records in the usage table are also reclaimed based on the following rules: ○ Usage is available for the selected product (at least one usage record) within the time period of the reclamation rule. ○ For the **Last Used Date** reclamation type, the install must be created greater than the **Last used before** value. ○ For the **Total Usage Time** reclamation type, the install date must be greater than the **Aggregate usage by** value.
Assignment group	The assignment group to manage the removal candidates created by the specific reclamation rule. Whenever a removal

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	candidate is created based on this rule, the assignment group mentioned in the reclamation rule is copied over to the removal candidate. By default, the value **Software managers** is selected. You can select any other group or create a group from the Group [sys_user_group] table.
Notify user	Option to notify the relevant user that you're requesting permission to remove the software.
Days before auto-reclamation	This field appears if you select **Notify user**. Once the removal candidate goes for approval and no response is received from the user, after the number of days mentioned in this field, the software product is revoked.
Software install condition/Subscription condition	The **Software install condition** field appears if you select **Installed Software** in the **Applies to** field. The Subscription condition field appears when the **Applies to** field is set to **Subscription software** in preconfigured rules.
Usage Metering Data	
This section appears only when you select **Total Usage Time**, **Peak Concurrent Usage**, or **Active Transaction Codes** from the **Reclamation type** field.	
Aggregate usage by	Time period over which usage information is aggregated. Possible values are the following: ○ Last Month ○ Last Two Months ○ Last Three Months ○ Last Six Months (available only if you select **Installed Software** from the **Applies to** list)
Total hours used	Amount of time that the software must be used to avoid reclamation.
Percent utilized	License utilization percentage. For example, If you specify 60% and you utilized less than 60%, then a reclamation candidate is automatically created for the remaining 40% rights. This field is available only when you select **Engineering App License** from the Applies to list.
Minimum transaction codes required	Minimum number of SAP transaction codes that must be active so that a named user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	can avoid reclamation. You can specify the applicable transaction codes in the SAP Transaction Codes related list. The list appears after you submit the reclamation rule. This field is applicable to only to the SAP publisher. This field is available only when **SAP Named User** is selected from the Applies to list.
Last Used Data	
This section appears only when you select **Last Used Date** from the **Reclamation type** field.	
Last used before	Amount of time to keep unused software before it's reclaimed. ○ One Month Ago ○ Two Months Ago ○ Three Months Ago ○ Six Months Ago ○ Nine Months Ago ○ One Year Ago

4. Select **Submit**.

   After the reclamation rule is created, add software products to the reclamation rule. You can also add a custom software product.

   Additionally, you can specify filter conditions on software products that are suite parents. For details on adding a custom software product, see Add a custom software product in Software Asset Management classic. For details on filter conditions, refer to Software reclamation rules.

5. Select **Edit** in the Software Products related list to add software products.

   When you add a product that is also a suite parent, all the suite components automatically get added and appear in the Software Product related list. The **Parent** field is automatically populated for all the suite components but it's empty for the suite parent.

   Additionally, when a product is added to the related list, the product process related list appears as well as any product processes (if already present in the system) for the parent and suite products.

6. If a product process doesn't exist for the software product, you can add a custom product process.

   a. Select **New** in the Product Process related list.

   b. On the form, fill in the fields.

   Note: The Product Process related list appears only when you select a software product with a product process.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Product	Software product.
File name	File name of the software product. The file name is required for the SCCM Usage to pull data.
Platform	Platform of the software product.

c. Select **Save**.

Note: The Product Process related list is displayed only when a software product with a product process is selected.

7. If you selected **SAP Named User** from the Applies to list, specify the SAP transaction codes that must be active to help prevent reclamation.

Note: This step is applicable to only the SAP publisher.

Not all specified transaction codes must be active to help prevent reclamation. The minimum number of transaction codes that must be active is based on the value of the **Minimum transaction codes required** field.

a. From the SAP Transaction Codes related list, select **Edit...**.

b. On the Edit Members form, select a transaction code from the Collection list or from the SAP Transaction Codes List.
The Collection list displays all available transaction codes. The SAP Transaction Codes List displays only the transaction codes that must be active to help prevent reclamation.

c. Select the right and left arrow icons to move the transaction code between the lists.

d. Select **Save**.

Create a custom file rule to manually define file sets

Create custom rules to manually define file sets and normalize data not recognized by the SAM API. After you have created custom rules, custom file sets can be discovered with File Signature Normalization and software records can be generated.

Before you begin
Role required: sam_admin

About this task
File Signature Normalization identifies software installation packages based on file attributes in a configuration item. The input is then sent to the SAM API. If there are files properties discovered that are not associated with the File Signature Normalization rule, you can manually normalize the data and send the input to the API to create a software installation record.

Note: File signature rules discovered in the content service library take precedence over custom file signature rules.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Custom File Normalization Rules** and create a new record (see table for field descriptions).

Unidentified File Set form

Field	Description
Publisher	Publisher of the software. You can use the lookup list provided. **Note:** Publisher is a reference to the company [core_company] table. Only companies you are using internally are shown.
Product	Software product name. The same lookup list provided on the Software Discovery Models form. You can create a custom product from the lookup list, if desired. **Note:** If the relationship between the software publisher [samp_sw_publisher] table and the company [core_company] table is not correct, products for that publisher may not be shown.
Version	Version of the software product. Required if version condition value is **[starts with]** or **[is-]**.
Edition	Edition of the software product to use when searching for the normalized discovery model. Required if edition condition value is **[starts with]** or **[is]**.
Platform	Platform of the software product to use when searching for the normalized discovery model. The default is **Anything** for Windows, macOS, UNIX.
Language	Language of the software product to use when searching for the normalized discovery model, which is populated once it has been normalized or added manually. The default is **Anything**.
Exclude from content service	Option to exclude file set rule from being included in content service library.
File name	Name of file associated with software installation as it exists in the system.
File size	Size of file name file in bytes.
File version	Version of file name file.

2. Click **Submit**.

Result

The custom rule is added to the Unidentified File Sets list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure third-party discovery sources for Software Asset Management

Set up a third-party discovery source for Software Asset Management to populate the Software Installation [cmdb_sam_sw_install] table with the software found in your environment.

Before you begin

To use the features of the Software Asset Management application with any third-party discovery source, you must populate the CMDB application and the related tables that reside on the ServiceNow instance. The Software Asset Management application uses the IRE API to help you populate the Software asset management tables. As the IRE API relies on the configuration item (CI) identifiers, the SAM tables require a relationship to the CI for IRE support. For more information on the IRE API, see Identification and Reconciliation Engine.

Role required: sam_developer

Procedure

1. Navigate to **All** > **Software Asset** > **Properties**.
2. Select the **Enable scheduled jobs when using third party Datasource Integration Framework** [com.snc.samp.ire.datasource.integration] property.
3. Run your discovery source to identify software on the CIs.
   The CI is used to construct a payload.
4. Send the payload to the ServiceNow instance using the IRE REST API.

   For information on a sample payload, see Sample payload for generic software install records.

   In the payload, make sure to send the sys_class_name of the CI, so that the CI is not reclassified when an insert or update operation is performed.

   An entry is created in the Software Installation [cmdb_sam_sw_install] table with a display name, publisher, and version. Reconciliation is run against the content service and a discovery model is identified for that software. If a discovery model does not exist, a discovery model is automatically created for the software. You can start using the Software Asset Management application.

Delete uninstalled software from the Software Installation table

Delete installations from the Software Installation [cmdb_sam_sw_install] table if those software installations are also uninstalled from a CI.

Before you begin

After the discovery process runs and you identify software installations that are uninstalled from a CI, delete those installations from the Software Installation [cmdb_sam_sw_install] table in the CMDB application.

Create a script to delete multiple software installation records from the Software Installation [cmdb_sam_sw_install] table. You can use the Table API to query the Software Installation table to get the installation list for the CI.

Role required: sam_developer

About this task

You can also delete software installation records for specific publishers like Oracle, VMware, and Citrix.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Use the REST Table API `api/now/table/cmdb_sam_sw_install?sysparm_query=installed_on%3D28c9c3b8c0a8000b009b2d941d7e3ee9` to query and identify the list of software installs on a specific CI.
   For more information on the REST endpoint API, see Table API-GET.

   a. Specify the table name, Software Installation [cmdb_sam_sw_install] table, and query parameters.
   For the query parameters, specify either the sys_id of the CI or a list of fields that are separated by commas such as publisher, version, and product on which you want to perform the delete operation.

   b. After entering the query parameters, send the request.
   You get a response in a JSON format listing of all the software installations for that specific CI. You can view the sys_id for all the software installations in the response.

2. Based on the response, identify the sys_ids of the software installations that are deleted on a CI.
   Only the sys_ids of those software installations must be passed through the Delete API.
3. Use the Delete API `request.setEndpoint('http://xyz/api/now/table/cmdb_sam_sw_install/728e87dafd841010fa9bea491bfdc1ff'); request.setHttpMethod('DELETE');` to delete the software installs from the Software Installation [cmdb_sam_sw_install] table.
   xyz in the URL refers to your ServiceNow instance.

   a. Specify the table name, Software Installation [cmdb_sam_sw_install] table, and the sys_ids of the software installations that are deleted on the CIs.

   b. Send the request.
   The software installations are deleted from the Software Installation [cmdb_sam_sw_install] table.

Create a reclamation rule to import Microsoft SCCM usage data

To import your Microsoft SCCM data, create a reclamation rule for the product that you want the usage information for.

Before you begin

Role required: sam_admin

About this task

A software product must have a product process, which consists of a filename, that is required for SCCM Usage to pull data. When adding a software product to a reclamation rule, any product processes associated with the software product are shown in the **Product Process** related list. Product processes are stored in the Software Product Process [samp_sw_product_process] table.

If a product process doesn't exist for a software product, you can create a custom one on the form. Product processes are stored in the Custom Product Process [samp_custom_product_process] table.

Some software products may not include a product process, but new product processes are added twice every week through the content library updates.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Reclamation Rules** and select **New**.
2. On the Reclamation Rule form, create a new record (see table for field descriptions).

Reclamation Rule form

Field	Description
Name	Name of the product for which you're creating the reclamation rule.
Applies to	Type of software to which the reclamation rule applies. ○ Installed Software ○ Engineering App License
Reclamation type	Type of data pulled from SCCM. ○ Total Usage Time ○ Last Used Date
Notify user	Check box for notifying the user assigned to the software requesting permission via email to remove the software.

3. If you selected **Total Usage Time** in the **Reclamation type** field, complete the fields in the Usage Metering Data section.

Field	Description
Aggregate usage by	Time period over which to aggregate usage information. ○ Last Month ○ Last Two Months ○ Last Three Months ○ Last Six Months
Total hours used	Amount of time the software must be used to avoid being reclaimed.

4. If you selected **Last Used Date** in the **Reclamation type** field, complete the fields in the Last Used Data section.

Field	Description
Last used before	Amount of time a user can keep unused software before it's reclaimed.

5. Select **Save**.
6. On the Software Product related list, complete the following steps if a product doesn't exist for your reclamation rule.
   a. Select **New**.
   b. On the Custom Software Product form, fill in the details to add the product information.
   c. Select **Submit**.
   d. On the Reclamation Rule form, select **Edit** in the Software Product related list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. On the Software Product related list, select **Edit**.
8. Select the product that you created with on the Custom Software Product form.
9. Select **Save**.
10. Complete the following steps if the software product that you selected doesn't have a product process associated with it.

    a. Select the link in the banner that displays on the Reclamation Rule form after you have applied the software product.

    b. On the Custom Product Process form, fill in the details to add a process to the product.

    Custom Product Process form

Field	Description
Product	Name of the product.
File name	Name of the file associated with the product.
Platform	Platform of the product.

    c. Select **Submit**

Example: Create a reclamation rule to import Microsoft SCCM usage data

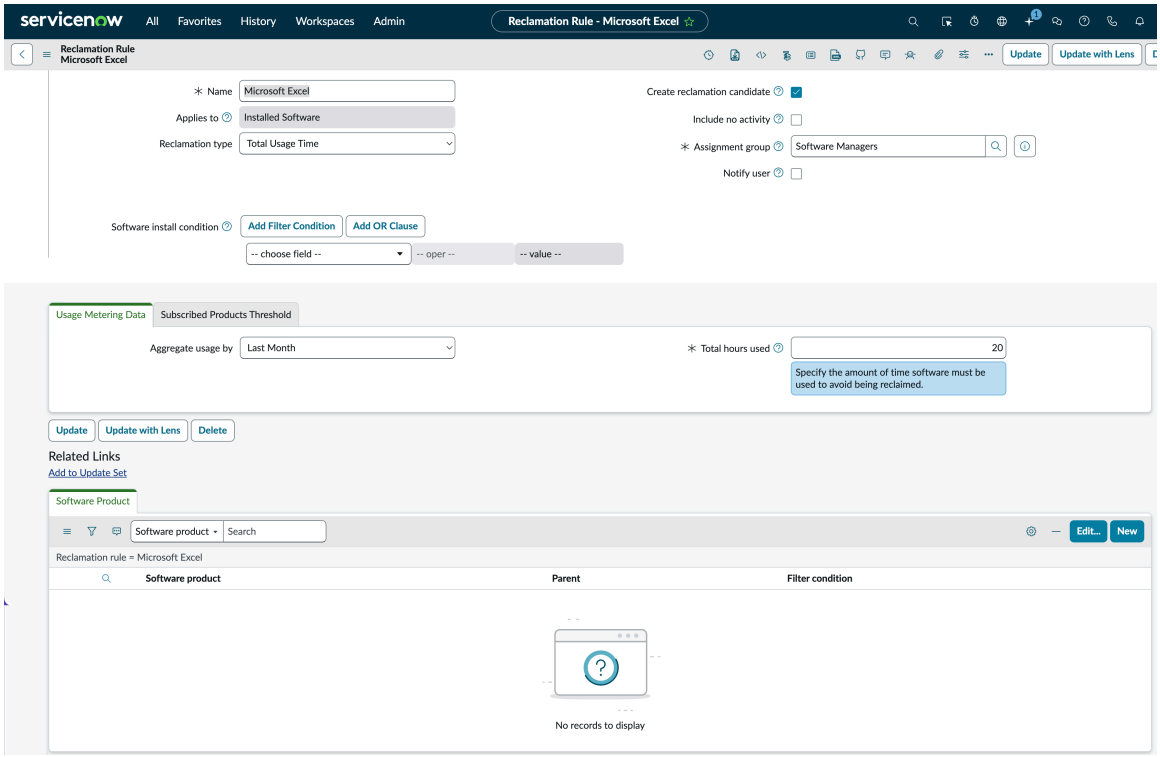
Create a reclamation rule to pull in the total usage data for Microsoft Excel from Microsoft SCCM.

To begin creating a reclamation rule, add the following information to the Reclamation Rule form.

Field	Description
Name	Microsoft Excel
Applies to	Installed Software
Reclamation type	Total Usage Time
Usage Metering Data	
Aggregate usage by	Last Month
Total hours used	20

Select **Save**.

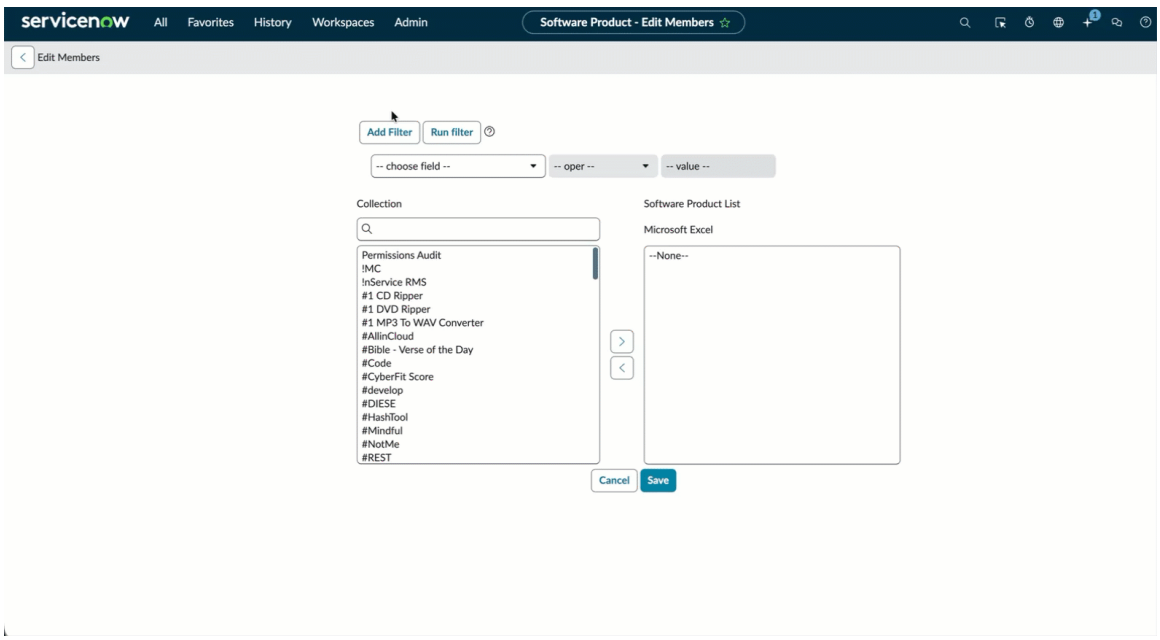
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



A software product exists for Microsoft Excel, so you must associate the product with the reclamation rule.

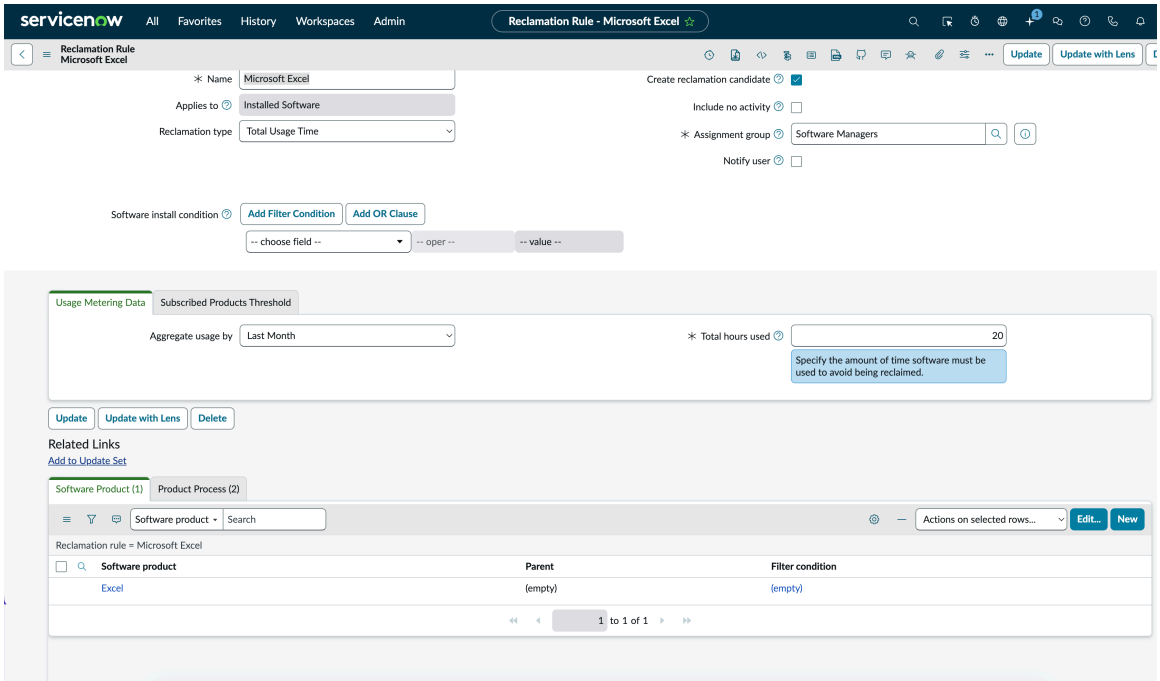
On the Software Product related list, select **Edit**.

On the Edit Members form, navigate to Excel in the Collection column and select Excel. Add it to the Software Product List column.

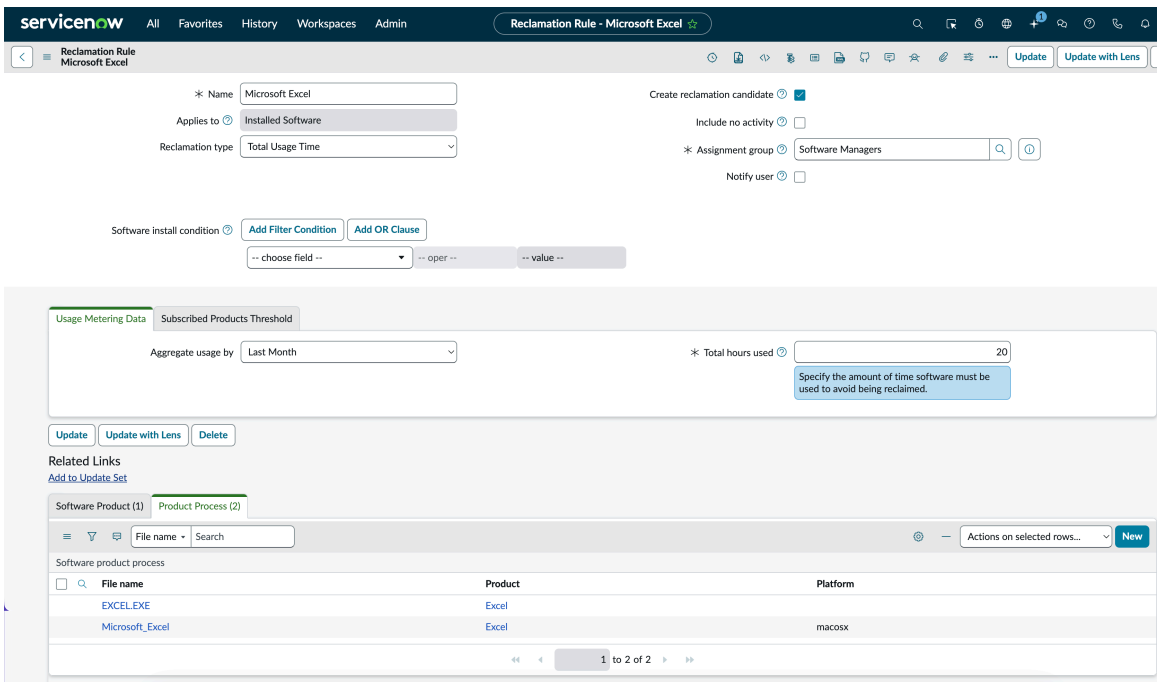


Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Two product processes are associated with Excel. Select the Product Process related list to view the product processes.



On the Reclamation Rule form, select **Save**.

What to do next

The reclamation rule is added to the Reclamation Rules list and the data of the product gets imported from SCCM during the next monthly scheduled import.

Add a custom part number

You can add a custom part number to resolve an entitlement import error that occurs when a part number does not exist in the Software Library.

Before you begin

Role required: sam_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

Navigate to **All** > **Software Asset** > **Administration** > **Custom Part Numbers** and create a new record (see table for field descriptions).

Custom Part Number form

Field	Description
Publisher part number	Manufacturer product code.
Entitlement definition	Discovery map associated with the part number. • Publisher • Product • Version • Edition • Language • Platform
License type	Specifies whether the rights grant full access to the software or if they are being upgraded from a previous version of the software. • Full • Upgrade
License metric	The license metric that will be used during reconciliation to determine how software rights are consumed.
Exclude from content service	Option that excludes the custom product details from being shared with Software Asset Management Content Service if opted in.

Add a custom license metric

You can add a custom license metric to modify the default reconciliation process.

Before you begin

Role required:

- to create or modify a custom metric script: sam_developer
- to read custom metric script: sam_admin

Role required to create or modify a custom metric script: sam_developer

About this task

Custom license metrics can be created to define specific software calculations not included in the predefined license metrics list. Custom license metrics are useful so reconciliation can calculate rights per user or device for certain software products and bundles of lesser-known software publishers.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For example, you can create a custom metric to avoid over counting installs for products that are part of an unrecognized bundle.

You can use the Resource Value [samp_sw_resource_value] table to enhance the custom license metric capability by doing a 1:1 calculation between the Units consumed column in the Resource Value [samp_sw_resource_value] table and the Licenses required column in the License Metric Results [samp_license_metric_result] table. You can create your own calculations in your custom license metric scripts and write your own logic to further customize your custom license metric. For information on adding resource values to the Resource Value [samp_sw_resource_value] table, see Specify resource values for your custom license metrics.

Custom metrics can be disabled using the custom license metric property. This feature is enabled by default.

Procedure

1. Navigate to **All** > **Software Asset** > **Administration** > **Custom License Metrics** and create a new record (see table for field descriptions).

Custom License Metric form

Field	Description
License metric	Name of the custom license metric. This name is shown in the **License Metric** field of software entitlements, and in the license metric results for the software model.
Table Source	Specify if this custom license metric belongs to the Software Installations [cmdb_sam_sw_install] table or the Resource Value [samp_sw_resource_value] table. **Note:** If the table specified is the Resource Value table, the following fields: **Reconciliation order – allocated**, **Reconciliation order – unallocated**, and **Allocation type** are not displayed. Additionally, the Calculation Script shows a sample script related to resource value.
Metric group	Custom license metric.
Allocation type	Allocation type of the metric license, per device or per user. ○ Device ○ User
Description	Description of the custom license metric.
Reconciliation order — allocated	Reconciliation metric rank priority for allocated licenses. Lower rank value takes precedence.
Reconciliation order — unallocated	Reconciliation metric rank priority for unallocated licenses. Lower rank value takes precedence.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Calculation	
Calculation Script	The calculation method for the license metric is script. Specify the reconciliation script.

2. Select **Submit**.

Custom license metric example script

The following is an example of a custom license metric script.

Note: This example is for demo purposes only and is not meant to be used for actual compliance scenarios.

```
<script><![CDATA[getRightsForDevice();
function getRightsForDevice(){
var rightsForDevice = -1;
 var deviceRecord = new GlideRecord('cmdb_ci_computer');
 if(deviceRecord.get(entity)){
  rightsForDevice = deviceRecord.getValue('disk_space');
 }
 return rightsForDevice;
}]]></script>
```

Specify resource values for your custom license metrics

If you create a custom license metric based on resource values, specify the resource value for each software product that you want to calculate licensing requirements for.

Before you begin

Role required: sam_user

Procedure

1. Open the Resource Value [samp_sw_resource_value] table.
   - If you're using the Software Asset Workspace, open the License operations view. From the License operations view, navigate to **Resource value** > **Resource value**.
   - If you're using the Software Asset Management classic application, navigate to **All** > **Software Asset** > **Administration** > **Resource Value**.
2. Select **New**.
3. On the form, fill in the fields.

Resource Value form

Field	Description
Name	Name of the resource value.
Software model	Software model of the software product that the resource value is associated with.
Company	Company of the associated software product.
Location	Physical location of the associated software product.
Units consumed	Total number of resource value units that you are currently consuming of the associated software product. For example, if you are protecting 50 terabytes of

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	data using a data protection software product, set the **Units consumed** field to 50.
Department	Department that the associated software product is assigned to.
Cost Center	Cost center that is financially responsible for the associated software product.

4. Save the resource value.
   - If you're using the Software Asset Workspace, select **Save**.
   - If you're using the Software Asset Management classic application, select **Submit**.

Result
When subsequent reconciliations run, the Software Asset Management application determines the license compliance position of the associated software product by comparing the value of the **Units consumed** field against the value of the corresponding **Licenses required** field in the License Metric Results [samp_license_metric_result] table.

Refresh processor definitions

After activating Software Asset Management, refresh processor definitions to normalize processors on servers in the CMDB.

Before you begin
Role required: sam_admin

About this task
Refresh processor definitions after activating Software Asset Management and before running reconciliation. Refreshing processor definitions enables CPU types (name of the processor discovered) to be mapped to the correct processor definition.

Refreshing processor definitions can be time consuming when running for the first time. Allocate enough time to complete this task before proceeding.

Procedure

Navigate to **All** > **Software Asset** > **Administration** > **Refresh Processor Definitions** and select **Proceed**.
The Processor definitions list is shown.

Migrate software installations

If you are using Discovery, run this script after installing the Software Asset Management application to copy previously discovered software installation records from the [cmdb_software_instance] table to the [cmdb_sam_sw_install] table, which is used by the Software Asset Management application to store software installation records.

Before you begin
Role required: sam_admin

About this task
If you are running Discovery and have used a version of Software Asset Management previously, there is no need to run this script. After the initial migration, Discovery writes new records directly to [cmdb_sam_sw_install] — re-running this script is not needed for new data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

When running the Migrate Software Installs script, allow enough time for the process to complete.

Procedure

Navigate to **All** > **Software Asset** > **Administration** > **Migrate Software Installs** and select **Proceed**.
The Software Installations list is shown. If the data has already been migrated, a message is shown.

Revert Software Asset Management customizations

After installing the Software Asset Management application for the first time, or upgrading from the Basic Software Asset Management, you need to revert customizations for all features work. The Revert Customizations module in the Software Asset Management application can revert customized files related to Software Asset Management back to the base configurations that were skipped during the installation or upgrade process.

Before you begin
Role required: sam_admin

About this task
The Revert Customizations module shows the **Software Asset Skipped Files** list. All customizations and configurations related to Software Asset Management can be reverted to the base application version.

To ensure feature functionality, you must revert customizations after:

- A new installation of the Software Asset Management Professional (com.snc.samp) plugin
- Upgrading from the Software Asset Management Foundation (com.snc.sams) plugin

You can also revert customizations using the **System Diagnostics** > **Upgrade History** navigation or using the Configuration Console for Software Asset Management. For more details about the Configuration Console for Software Asset Management, see Configuration Console for Software Asset Management.

Procedure

1. Navigate to **Software Asset** > **Administration** > **Revert Customizations** to view the Software Asset Skipped Files list.
2. Select **Revert** to revert all files with a disposition of **Skipped** to the base application version.
3. Verify that the disposition of all skipped files is **Reverted** in the customization summary.
   You can also verify the disposition of all skipped files in the Upgrade Details [sys_upgrade_history_log] table and the current OOB version in the Update Versions [sys_update_version] table.

Related topics

Configuration Console for Software Asset Management

Configuration Console overview

Configure Software Asset Management using the Configuration Console

Manage Software Library

Use the Manage Software Library module to manually upload software library data to on-premise instances (instances not in the cloud to receive automatic Software Library updates). You

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

can also choose to export your normalization content for participation in the Software Asset Management content service.

Before you begin

Role required: admin (to enable module), sam_admin (to manage software library)
Activate the Manage Software Library module to manage Software Library content imports or exports by navigating to **System Definition** > **Modules**. Ensure that the **Active** column in the Manage Software Library module is set to true.

About this task

The Manage Software Library module must be activated using the System Definition module for it to be shown in the Software Asset Management administration navigation.

Software Library content data is provided in a zip file. The zip file contains files with consistent file sizes for improved performance. During import, data tables are successfully updated with content from the XML file during a background process.

A worker is an object that performs some work in one or more background threads. To import multiple XML files simultaneously, workers are used. To change the number of workers that run simultaneously, update the following two system properties with the number of workers being used:

- glide.sys.schedulers
- com.snc.samp.recon.max_workers

To upload an attachment larger than 1 GB, you need to update the *com.glide.attachment.max_size* system property to reflect the size of the content zip file.

You can also export your data for participation in the Software Asset Management content service to contribute to the improvement of the normalization service.

Procedure

1. Navigate to **Software Asset** > **Administration** > **Manage Software Library**.
2. To import the Software Library content file:
   a. Select **Import Software Library Content File**.
   b. Select **Attach Content File** to choose the Software Library content (.zip) file.
   c. Select **Run Import**.
      In the Import Files related list, track the progress of the import by seeing how many files have been processed and how many are still being processed. All the data in the Import Files related list is stored in the SAMP Import File [samp_import_file] table. For a more high level view of the import process, you can also view the Asset Job Logs [asset_job_log] table.
3. To export your normalization content:
   a. Select **Content Service Opt-In: Export Normalization Content**.
   b. Select **Run Export**.
   c. When the export status is **Ready for Download**, select **Refresh**.
   d. Select the attachment to open or save.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Platform Analytics Solution for Software Asset Management classic

This Platform Analytics Solution contains preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

Enabling the Performance Analytics Solution

Use the Performance Analytics widgets on the dashboard to visualize data over time, analyze your business processes, and identify areas of improvement. With solutions, you can get value from Performance Analytics for your application with minimal setup.

Note: Solutions include some dashboards that are inactive by default. You can activate these dashboards to make them visible to end users according to your business needs.

For unlimited access to all features of this Platform Analytics Solution, purchase a Performance Analytics subscription. For more information, see Activating your Performance Analytics subscription.

The Performance Analytics - Content Pack - Software Asset Management classic is enabled automatically when ServiceNow activates Software Asset Professional on your instance.

Domain separation and 'Run As' user

In some solutions, System Administrator is the **Run As** user for data collection jobs in the Platform Analytics Solutions. In other solutions, the **Run As** user for data collection jobs is left blank. Verify that the **Run As** user exists on the instance, and that this user has the appropriate level of access. An inappropriate **Run As** user can cause errors or limit the data that is collected. This setting only has an effect if domain separation is enabled.

Related topics

Activate your Performance Analytics subscription

Software Asset Analytics dashboard

View true-up costs and license, compliance, and removal summaries trend charts on the Software Asset Analytics dashboard integrated with Performance Analytics.

Note: The Software Asset Analytics dashboard is no longer available for new Brazil users who have activated the Software Asset Management Professional (com.snc.samp) plugin or upgraded to Brazil without activating the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil.

- If you activated the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil but didn't activate the Workspace plugin (com.sn_sam_workspace), you have access to this dashboard.
- If you activated the Software Asset Workspace (sn_sam_workspace) store application after upgrading to Brazil, you won't be able to access this dashboard from the **Software Asset** navigation menu in your instance. You can however access this dashboard from the **Dashboards** navigation menu.

The Software Asset Analytics dashboard tab is accessed by navigating to **Software Asset** > **Overview**. Select an element within a report to see more information, or add and move widgets as needed.

The Overview, License Summary, and Compliance Summary tabs are updated whenever a new reconciliation result is available. Results are updated daily for the **Removal Summary** tab. You can save charts in PNG or JPG formats.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The graphs show important statistics about the software that is being tracked. In the **Overview** and **Optimization**, you can filter by publisher and product to narrow the results.

Note: If you are not seeing data in the Overview dashboard, verify the *glide.cms.enable.responsive_grid_layout* system property is set to true.

Overview tab

Overview tab

Report	Source list	Description
True-up Cost	Product Results	Cost to be compliant based on the average prices in entitlements for the rights.
Publishers out of Compliance	Product Results	Number of publishers that have at least one software model out of compliance. Select the report to view the results in the Software license usage.
Products out of Compliance	Product Results	Number of products that have at least one software model out of compliance. Select the report to view the results in the Software license usage.
Potential Savings	Product Results	Cost saved if removal candidates are reclaimed.
True-up Cost Breakdown	Product Results	Cost to be compliant based on the average prices in entitlements for the rights by publisher.
Software Spend Breakdown	License Metric Results	Total software cost of all entitlements not retired by publisher.
End of Life Products	Product Lifecycle [sam_sw_product_lifecycle]	Heat map of software product lifecycles that are reaching their end of life cycle. Select to drill-down to the software installations.

License Summary

License Summary tab

Report	Source table	Description
Overall Product Compliance	Product Result	Total percent of compliant products.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License Summary tab (continued)

Report	Source table	Description
	[samp_product_result]	
Percent Spend Not in Use	Product Result and License Metric Results [samp_product_result] and [samp_license_metric_result]	Percent of software spend that is not in use (over-licensed amount and potential savings).
Expiring Maintenance Entitlements	Software Entitlement [alm_license]	End date of the total sum of all entitlements that are going to expire within 6 months. The total sum of entitlements includes: • Perpetual • Maintenance • Perpetual + Maintenance • Upgrade • SA • Perpetual +SA • Step-up Select the report to view details about the specific entitlements that are going to expire. **Note:** Maintenance and SA entitlements are not displayed as the Perpetual entitlements associated with them are displayed.
Software Spend	License Metric Results [samp_license_metric_result]	Total software cost of all entitlements that are not retired.
Week over Week Cost Summary	Product Result and License Metric Results [samp_product_result] and [samp_license_metric_result]	True-up cost, potential savings, and over-licensed amount for a series of weeks.
Month Over Month Software Spend	License Metric Results [samp_license_metric_result]	Total software spend in a series of months.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License Summary tab (continued)

Report	Source table	Description
Potential Savings by Optimizing Licenses	Potential Savings by Optimizing Licenses [samp_license_optimization_summary]	Potential cost savings for licenses on your physical hosts and clusters that are based on recommended license optimizations. **Note:** This report is available only for Microsoft Windows Server and on-premise Red Hat Enterprise Linux (RHEL) licenses. Select the report to view details about the recommended license optimizations and associated cost savings for each host or cluster. License optimizations include the recommended license, recommended rights, and recommended spend.
Overall Publisher Compliance	Product Result [samp_product_result]	Percentage of products that are compliant by publisher.
Spend In Use by Publisher	Product Result and License Metric Results [samp_product_result] and [samp_license_metric_result]	Spend in use by publisher = [[Total spend] — [Over-licensed amount] — [Potential savings]] / Total spend.
Software Spend by Publisher	License Metric Results [samp_license_metric_result]	Total software spend by publisher.

Compliance Summary

Compliance summary consists of time-series data using Performance Analytics to show the compliance trends over time. The source for compliance analysis data is the Product Result [samp_product_result] table.

Compliance trend: True-up Cost

Report	Description
True-up Cost	Cost to be compliant based on the average prices for entitlements for the rights.
Publishers out of compliance	Number of publishers that have at least one software model out of compliance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Compliance trend: True-up Cost (continued)

Report	Description
Products out of compliance	Number of products that have at least one software model out of compliance.
Potential savings	Cost saved if removal candidates are reclaimed.
Breakdowns	Shows the detailed list of results based on the widget selected. Breakdowns include Publisher, Product, and Scorecard.
Records	Shows the detailed list of product results based on the widget selected.

Compliance trend: Over-licensed amount

Report	Description
Over-licensed amount	Cost of licenses owned but not being used.
Publishers over-licensed	Number of publishers that have at least one software right not being used.
Products over-licensed	Number of products that have at least one software right not being used.
Breakdowns	Shows the detailed list of results based on the widget selected. Breakdowns include Publisher, Product, and Scorecard.
Records	Shows the detailed list of product results based on the widget selected.

Removal Summary

The source for removal summary data is the Reclamation Candidate [samp_sw_reclamation_candidate] table.

Removal Summary tab

Report	Description
Reclamation Candidates	Total number of active removal candidates with a low usage justification. Select the report to show the filtered list of records.
Restricted Installs Being Removed	Total number of active removal candidates with a restricted software justification. Select the report to show the filtered list of records.
Unlicensed Installs Being Removed	Total number of active removal candidates with an unlicensed justification.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Removal Summary tab (continued)

Report	Description
	Select the report to show the filtered list of records.
Unallocated Installs Being Removed	Total number of active removal candidates with an unallocated justification. Select the report to show the filtered list of records.
Candidates Requiring Attention	Number of removal candidates in the attention required state. Select the report to show the filtered list of records.
Candidates Not Updated in 30 Days	Number of removal candidates that have an updated date value older than 30 days. Select the report to show the filtered list of records.
Actual Savings Year-to-date	Sum of potential savings in a given month of closed complete removal candidates.
Removal Candidates Breakdown	Active removal candidates in various breakdowns (State, Publisher, Product, Justification, and Last Updated).

Software Asset Management dashboard

View true-up costs, optimization results, and compliance trend charts on the Software Asset Management dashboard.

Note: The Software Asset Management dashboard is no longer available for new Brazil users who have activated the Software Asset Management Professional (com.snc.samp) plugin or upgraded to Brazil without activating the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil.

- If you activated the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil but didn't activate the Workspace plugin (com.sn_sam_workspace), you have access to this dashboard.
- If you activated the Software Asset Workspace (sn_sam_workspace) store application after upgrading to Zurich, you won't be able to access this dashboard from the **Software Asset** navigation menu in your instance. You can however access this dashboard from the **Dashboards** navigation menu.

The Software Asset Management dashboard tab is accessed by navigating to **Software Asset > Overview** and selecting **Software Asset Management** from the dashboard list. Select an element within a report to see more information, or add and move widgets as needed.

Results are updated daily, or whenever a new reconciliation result is available, and can be refreshed by selecting the **Refresh** icon for each result. You can also save charts in PNG or JPG formats.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The graphs show important statistics about the software being tracked. In the Overview and Optimization tabs, you can filter by publisher, product, department, and country to narrow the results.

Overview

The source for overview data is the Product Result [samp_product_result] table.

Overview tab

Report	Description
Total True-up Cost	Cost to be compliant based on the average prices in entitlements for the rights.
Publishers out of Compliance	Number of publishers that have at least one software model out of compliance. Select the report to show the filtered list of records.
Products out of Compliance	Number of products that have at least one software model out of compliance. Select the report to show the filtered list of records.
Potential Savings	Cost saved if removal candidates are reclaimed.
Top 10 Products by True-up Cost	Top 10 products graphed in order of true-up cost.
Top 10 Products by Potential Savings	Top 10 products graphed in order of potential savings.

Optimization

The source for optimization data is the Reclamation Candidate [samp_sw_reclamation_candidate] table.

Optimization tab

Report	Description
Reclamations Requiring Attention	State is Attention Required
Potential Savings	• Created on This Year OR Active is true OR • Closed on This Year AND Opened on Last Year
Actual Savings YTD	Closed on This Year AND State is Closed Complete
All Active Reclamations by State	Active is true

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Optimization tab (continued)

Report	Description
Top 10 Active Reclamations Breakdown	Active is true
Actual Savings per Month	State is Closed Complete AND Closed in Last 12 Months

Removal candidate state color key:

Color	State
Red	Attention Required
Green	Ready
Yellow	Awaiting Use
Orange	Awaiting Approval
Purple	Awaiting Revocation
Blue	Closed Complete

Compliance Analysis

Compliance analysis consists of time-series data using Performance Analytics to show the compliance trends over time. The for compliance analysis data is the Product Result [samp_product_result] table.

Compliance Analysis: True-up Cost

Report	Description
True-up Cost	Cost to be compliant based on the average prices for entitlements for the rights.
Publishers out of compliance	Number of publishers that have at least one software model out of compliance.
Products out of compliance	Number of products that have at least one software model out of compliance.
Potential savings	Cost saved if removal candidates are reclaimed.
Breakdowns	Shows the detailed list of results based on the widget selected.
Records	Shows the detailed list of product results based on the widget selected.

Compliance Analysis: Over-licensed amount

Report	Description
Over-licensed amount	Cost of licenses owned but not being used.
Publishers over-licensed	Number of publishers that have at least one software right not being used.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Compliance Analysis: Over-licensed amount (continued)

Report	Description
Products over-licensed	Number of products that have at least one software right not being used.
Breakdowns	Shows the detailed list of results based on the widget selected.
Records	Shows the detailed list of product results based on the widget selected.

Normalization and Content Service dashboard

View normalization trend charts on the Normalization and Content Service dashboard integrated with Performance Analytics.

Note: The Normalization and Content Service dashboard is no longer available for new Brazil users who have activated the Software Asset Management Professional (com.snc.samp) plugin or upgraded to Brazil without activating the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil.

- If you activated the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil but didn't activate the Workspace plugin (com.sn_sam_workspace), you have access to this dashboard.
- If you activated the Software Asset Workspace (sn_sam_workspace) store application after upgrading to Brazil, you won't be able to access this dashboard from the **Software Asset** navigation menu in your instance. You can however access this dashboard from the **Dashboards** navigation menu.

The Normalization and Content Service dashboard tab is accessed by navigating to **Software Asset** > **Overview** and selecting **Normalization and Content Service** from the dashboard list. You can also access it from the dashboard list of another Software Asset Management dashboard. Select an element within a report to see more information, or add and move widgets as needed.

Normalization chart results are updated daily when the **SAM — Discovery Model Normalization** job is run. You can save charts in PNG or JPG formats.

Report	Source list	Description
Overall Normalization Rates for Licensable Software	Software Installs Normalization Rates	Overall normalization status count for all licensable products.
Normalization Rate Breakdown for Top Publishers	Software Install Normalization Rates for Top Publishers	Licensable normalization status count per top publisher for Microsoft, Oracle, IBM, VMware, Citrix, SAP, and Adobe.

Central Data Service Download Status related list

The Central Data Service Download Status related list is updated daily when the **SAM — Central Data Service Download Status** job is run.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Name	Table name from which content is pulled.
Current count	Number of records in the table.
Expected count	Expected number of records in the table.
Last updated on	Last date and time the data was pulled.
Next action	Next scheduled date and time to pull data.

Engineering License Overview dashboard

Monitor and gain insights into your engineering applications license position and usage by viewing product usage reports in the Engineering License Overview dashboard.

Note: The Engineering License Overview dashboard is no longer available for new Brazil users who have activated the Software Asset Management Professional (com.snc.samp) plugin or upgraded to Brazil without activating the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil.

- If you activated the Software Asset Management Professional (com.snc.samp) plugin prior to Brazil but didn't activate the Workspace plugin (com.sn_sam_workspace), you have access to this dashboard.
- If you activated the Software Asset Workspace (sn_sam_workspace) store application after upgrading to Zurich, you won't be able to access this dashboard from the **Software Asset** navigation menu in your instance. You can however access this dashboard from the **Dashboards** navigation menu.

The Engineering License Overview dashboard displays reports on normalized products and publishers that belong to engineering applications such as AutoCAD, GIS.

Access the Engineering License Overview Dashboard by navigating to **Software Asset** > **Engineering License Overview**.

To narrow your results based on products or publishers across all tabs, use the filter in the left-hand corner of the dashboard. Only products and publishers that belong to engineering applications and are listed in the Engineering Application License [samp_eng_app_license] table appear in the filter. If no product or publisher is selected, the tabs display the cumulative data for all products and publishers that belong to engineering applications.

The **Overview**, **License Usage Summary**, and **Denial Summary** tabs are updated daily or whenever a new reconciliation result is available. You can save charts in PNG or JPG formats for viewing them locally and for sharing.

Overview tab

This tab gives an overview of the high-level metrics of all engineering applications. You can filter the results in this tab by various date options.

Note: The Date filter is not applicable to **Current Spend** and **Potential Savings**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Overview tab

Report	Source table	Description
Current Spend	Product Result [samp_product_result]	Total cost of all entitlements for all products.
Potential Savings	License Dashboard Inventory [license_dashboard_inventory]	Cost saved if licenses are not being utilized to their potential or are under-utilized. To optimize your costs, you can reallocate those licenses or return the licenses and save the cost.
Top Used Products	Engineering Application Usage [samp_eng_app_usage]	Top products that are being currently used. The number of days and hours being used per product also appears.
Top Active Users	Engineering Application Usage [samp_eng_app_usage]	Top users who are currently using the product. The number of days and hours being used per user also appears.
Top Idle Users	Engineering Application Usage [samp_eng_app_usage]	Top users who have requested a license but are not using the license. The number of days and hours of inactivity per user also appears.
Top Denied Products	Engineering Application Denial [samp_eng_app_denial]	Top products that are denied to users as these products have reached their peak concurrent usage.
Top Denied Users	Engineering Application Denial [samp_eng_app_denial]	Top users that are denied licenses to products.
Product Usage by Location	Engineering Application Usage [samp_eng_app_usage]	Based on the count of users using products by location.

License Usage Summary tab

This tab lets you view data based on a license type (floating, network, or token). You can filter the data in this tab by date, license type, and license management server.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License Usage Summary tab

Report	Source table	Description
License Usage overtime	Engineering Application License [samp_eng_app_license] Engineering Application Concurrent Usage [samp_eng_app_concurrent_usage] Engineering Application Denial [samp_eng_app_denial]	The total number or quantity of all available licenses; not just the active products but all the products. • The blue line represents the total number of licenses allocated to a product or a publisher • The green line indicates the concurrent usage of the licenses. • The red line indicates denials or if and when the concurrent usage peaks.
License Inventory	Engineering Application License [samp_eng_app_license]	All available licenses for a product or publisher.
License Server Statistics	Engineering Application License Server [samp_end_app_license_server]	All the license management servers that OpenLM or Open iT connect with.

Denials Summary tab

You can filter the data in this tab by date, user, or user group.

Denials Summary tab

Report	Source table	Description
Denials Over Time	Engineering Application Denial [samp_eng_app_denial]	Denials for a product over a period of time.
Denials by Product	Engineering Application Denial [samp_eng_app_denial]	The products that have been denied to users the most.
Denials by License Server	Engineering Application Denial [samp_eng_app_denial]	The license servers that have been denied licenses to products the most.

Software Asset Management references

Use the descriptions provided to help you fill in the Software Asset Management forms.

Components installed with Software Asset Management Professional

Roles, plugins, and scheduled jobs are installed with the activation of the Software Asset Management Professional application. Demo data is available with this application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scheduled jobs installed

To view the list of scheduled jobs installed with the Software Asset Management Professional application, navigate to your ServiceNow instance, select **All**, and enter `Scheduled jobs` in the application navigator. On the Scheduled jobs page, select the Show/hide filter and in the condition builder, enter the filter condition, `Name starts with` SAM.

Roles installed

The following roles are installed with the Software Asset Management Professional application.

Software Asset Management Professional roles

Role name	Description	Contains roles
Software Asset Management administrator [sam_admin]	Granular admin role that has full access to the Software Asset Management application. This role is required to import entitlements, manage reclamation rules, run reconciliation, create custom products and pattern normalization rules, set up Content Service, and other administrative features.	• sam_user • sam_spend_import • asset • model_manager • contract_manager **Note:** The sam_spend_import role is installed with Software Spend Detection. The it_demand_user role is no longer automatically installed with PPM Standard.
Software Asset Management user [sam_user]	This role has access to all Software Asset Management features except administrative. If Software Spend Detection is installed, this role has access to all Software Spend Detection features except financial transaction data import and Content Service setup.	• pa_viewer • cmdb_read • report_user • sn_remote_dir_sync.reader
Software Asset Management developer [sam_developer]	Writes scripts on the platform, comparable to the script-writing privileges granted to a sys_admin. Users with this role must be trained ServiceNow administrators.	sam_admin
SaaS License Management integration administrator [sam_integrator]	Granular admin role required to create and manage SaaS integration profiles.	• sam_user • connection_admin • flow_operator

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Professional roles (continued)

Role name	Description	Contains roles
Software Spend Detection import user [sam_spend_import]	Role required to import financial transaction data into Software Spend Detection. Users with this role have access to all Software Spend Detection features except Content Service setup. Users with this role cannot view Software Asset Management without being granted additional roles.	pa_viewer

Plugins installed

The following plugins are installed with the Software Asset Management Professional application.

Software Asset Management Professional plugins

Plugin	Location	Description
Activate all Software Asset Management Professional plugins including Software Asset Workspace com.sn_samp_master_ws	Now Support Service Portal	Requires subscription. Provides the capability to normalize software discovery information, reconcile entitlements with installs, and reclaiming unused software. Provides additional capabilities to reconcile publisher products. Loads the following plugin and store application in one step: • Software Asset Management Professional (com.sn_samp_master) plugin • Software Asset Workspace (sn_sam_workspace) store application.
Activate all Software Asset Management Professional plugins (com.sn_samp_master)	Now Support Service Portal	This plugin is for releases prior to Brazil. Loads the following Software Asset Management Professional plugins in one step: • Software Asset Management Professional (com.snc.samp) plugin • All publisher pack add-on plugins

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Professional plugins (continued)

Plugin	Location	Description
		• Software Asset Management UI Components (com.sn_samp_workbench) **Note:** To enable SaaS License Management, you must request the Software Asset Management — SaaS License Management (sn_sam_saas_int) plugin separately from the ServiceNow Store. See Request SaaS License Management for information on how to request and activate this plugin.
Integration — Microsoft SCCM 2012 v2 Software Usage (com.snc.samp_usage_sccm)	Now Support Service Portal	Required to gather software usage data from Microsoft SCCM (System Center Configuration Manager) 2012 v2. Automatically activates the Integration — Microsoft SCCM 2012 v2 (com.snc.integration.sccm2012v2) plugin if not already active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Professional plugins (continued)

Plugin	Location	Description
		Important: This plugin will be deprecated in the Tokyo release. If you are integrating with SCCM for the first time, request and install the Service Graph connector for Microsoft SCCM application from the ServiceNow Store instead. If you have already activated this plugin on your ServiceNow instance, use the Migration Readiness Tool for Service Graph Connector for SCCM store application to prepare your instance for migration to the Service Graph connector. See Service Graph connector for Microsoft SCCM for more information on the Service Graph connector.
Integration — Microsoft SCCM 2016 Software Usage (com.snc.samp.usage_sccm_2016)	Now Support Service Portal	Required to gather software usage data from Microsoft SCCM (System Center Configuration Manager) 2016. Automatically activates the Integration — Microsoft SCCM 2016 (com.snc.integration.sccm2016) plugin if not already active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Professional plugins (continued)

Plugin	Location	Description
		Important: This plugin will be deprecated in the Tokyo release. If you are integrating with SCCM for the first time, request and install the Service Graph connector for Microsoft SCCM application from the ServiceNow Store instead. If you have already activated this plugin on your ServiceNow instance, use the Migration Readiness Tool for Service Graph Connector for SCCM store application to prepare your instance for migration to the Service Graph connector. See Service Graph connector for Microsoft SCCM for more information on the Service Graph connector.
Orchestration — Client Software Distribution (com.snc.orchestration.client_sf_distribution)	Now Support Service Portal	Required to activate ServiceNow® Orchestration application, which enables install and uninstall functionality of software on devices. **Note:** Users who purchase the Software Asset Management Professional (com.snc.samp) plugin are licensed for software uninstall functionality only, also called software reclamation. Additional licensing is required for software install functionality.
Software Asset Management — SaaS License Management (sn_sam_saas_int)	ServiceNow Store	Requires the Software Asset Management Professional (com.snc.samp) plugin. Provides integrations to

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Professional plugins (continued)

Plugin	Location	Description
	See Request SaaS License Management for information on how to request and activate this plugin from the ServiceNow Store.	manage licenses for SaaS products.
Software Asset Management — Spend Detection (com.sn_sam_spend)	Now Support Service Portal	Requires the Software Asset Management Professional (com.snc.samp) plugin. Provides core capabilities to detect software spend from financial transaction data.
File Signature Normalization (com.snc.file_signature_normalization)	Now Support Service Portal	Required to normalize discovered file signatures while creating installed software records. This plugin also gets activated with File-based Discovery.
Mobile Employee Experience My Asset (com.glide.mobile-employee.myassets)	Now Support Service Portal	Provides the capabilities needed for end users to view assigned assets on a mobile device and to create incidents to request service for these assets.
IT Asset Management Mobile (com.sn_itam_mobile)	Now Support Service Portal	Provides the capabilities for receiving personnel to receive purchased assets on a mobile device.
Publisher pack add-on plugins		
Software Asset Management Professional for Adobe (com.sn_samp_adobe)	Now Support Service Portal	Provides additional capabilities to reconcile Adobe subscription software.
Software Asset Management Professional for Citrix (com.sn_samp_citrix)	Now Support Service Portal	Provides additional capabilities to reconcile Citrix software, such as Virtual Applications and Virtual Desktop.
Software Asset Management Professional for IBM (com.sn_samp_ibm)	Now Support Service Portal	Provides additional capabilities to reconcile IBM products using PVU and RVU license metrics. This plugin also provides additional capabilities to reconcile Red Hat Enterprise Linux software, such as Red Hat Enterprise Linux Server

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management Professional plugins (continued)

Plugin	Location	Description
		and Red Hat Enterprise Linux for Virtual Datacenters.
Software Asset Management Professional for Microsoft (com.snc.samp.microsoft)	Now Support Service Portal	Provides additional capabilities to reconcile Microsoft software such as Microsoft SQL Server.
Software Asset Management Professional for Oracle (com.snc.samp.oracle)	Now Support Service Portal	Provides additional capabilities to reconcile Oracle software, such as Oracle Database.
Software Asset Management Professional for SAP (com.sn_samp_sap)	Now Support Service Portal	Provides additional capabilities to reconcile SAP named user compliance and optimization.
Software Asset Management Professional for VMware (com.sn_samp_vmware)	Now Support Service Portal	Provides additional capabilities to reconcile VMware software, such as vCenter and vSphere.
Software Asset Management Professional for Engineering Applications (com.sn_samp_eng_app)	Now Support Service Portal	Requires the Software Asset Management Professional (com.snc.samp) plugin. Provides additional capabilities to reconcile engineering applications such as AutoCAD.

License agreement types

Types of license agreements determine the product usage rights.

Agreement types

The agreement types for the publisher packs.

Publisher pack	Agreement type
Adobe	• Generic • Enterprise Term License Agreement (ETLA) • Cumulative Licensing Program (CLP) • Transactional Licensing Program (TLP) • Value Incentive Plan (VIP)
Citrix	Generic

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Publisher pack	Agreement type
Common	• Generic • Enterprise License Agreement (ELA)
Custom	• Generic • Enterprise License Agreement (ELA)
IBM	• Generic • Enterprise License Agreement (ELA) • International Program License Agreement (IPLA): No license impact. • IBM Customer Agreement (ICA): No license impact. • IBM Unlimited License Agreement (IULA)
Microsoft	• Generic • Enterprise Agreement • Enterprise Enrollment • Enterprise Subscription Agreement • Microsoft Products and Services Agreement • Open License • Open Value • Open Value Subscription • Select Enrollment • Select License • Select Plus
Oracle	• Generic • Unlimited License Agreement (ULA)
VMware	• Generic • Enterprise License Agreement (ELA) • Enterprise Purchasing Program (EPP): No license impact. • Volume Purchasing Program (VPP): No license impact.

Software Asset Management properties

You can set default reconciliation properties such as grouping and reconciliation debugging.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

These properties are available for the Software Asset Management application.

To access these properties, navigate to **All** > **Software Asset** > **Administration** > **Properties**.

You can also access the SAM properties using the Configuration Console for Software Asset Management. For more details about the Configuration Console for Software Asset Management, see Configuration Console for Software Asset Management.

Properties for Software Asset Management

Property	Description
Select the default Group setting for the weekly run of reconciliation com.snc.samp.recon.group	Determines how rights and software installations are grouped during reconciliation. Values (default is **None**): • **Company** • **Cost Center** • **Country** • **Department** • **Region**
com.snc.sam.auto_suite_inference	Automatically infers the parent software model suite for a software model based on its child software models. Default value is **false**. When enabled, individual software installations get mapped to the appropriate suite entitlement for accurate license compliance calculations.
SAM Workspace License operations list count limit sn_sam_workspace.sam_license_operations_list_count	Enables setting up a threshold limit to show the count of software asset records on the License operations view. SAM administrator can set the value of the threshold limit as required. Value is set to **5000000**. If there are less than five million records, then the exact count of software installation records is shown. If there are more than five million records, then the count is shown as 5000000+.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
Select the default Subgroup setting for the weekly run of reconciliation com.snc.samp.recon.subgroup	Determines the secondary grouping for rights and software installations during reconciliation. Except for `None`, group and subgroup values must be different. Values (default is **None**): • **Company** • **Cost Center** • **Country** • **Department** • **Region**
Run reconciliation with all available custom license metrics com.snc.samp.recon.enablecustommetrics	Enables custom license metrics when running reconciliation. If you have a custom license metric configured, it is not applied when this property is set to **No**. The default is **Yes**.
Enable debugging of reconciliation results. Note that enabling debugging will have an impact on performance. com.snc.samp.debug	Enables debugging of reconciliation results to troubleshoot a result. The default is **No**. Additionally, this property also triggers logging for on-premise import debugging.
Automatically create software models for all 'licensable' products com.snc.samp.automaticsmrcreation	Automatically creates a software model, in a non-compliant state, for any unlicensed installations, subscriptions, or options (of licensable products) in the Product Results list that don't have an entitlement. The new software model and results are used to show the unlicensed count in the License Position Report.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
	Note: For more information on automatically creating software models, see Automatic creation of software models.
Automatically create software model results for unlicensed products during software asset reconciliation com.snc.samp.unlicensed_smr_creation	Disables software model result creation for unlicensed software models. Software model results continue to be created for software models that have valid entitlements. The default value is **False**. You can modify the value using system properties configuration. When the property is set to **True**, the software model results get created for software models that don't have entitlements or have installs requiring action.
Select the level of aggregation for reconciling licenses for Oracle databases and WebLogic servers on VMware com.snc.samp.oracle.reconlevel **Note:** This property is available only if you have activated the Software Asset Management publisher pack for Oracle. **Note:** This property supports domain separation using the domain separation application properties for Software Asset Management. See Set up domain-specific reconciliation properties for Oracle for more details.	Level of aggregation that is used for reconciling Oracle Database and WebLogic Server licenses on VMware virtualization technology. Software Asset Management supports the following aggregation levels: • **ESX**: The **ESX** aggregation level considers all processor cores on the ESX host. • **ESX cluster** (default value): The **ESX cluster** aggregation level considers all processors on every ESX server within a cluster. • **vCenter(s)**: The **vCenter(s)** aggregation level considers all processor cores on every ESX server. If you select this aggregation level, licensing calculations are based on the ESXi version that you're

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
	using in your VMware virtual environment. See Oracle Database and WebLogic Server licensing in soft-partitioned environments for more information on the supported ESXi versions.
Use host affinity for reconciling licenses for Oracle databases and WebLogic servers on VMware at the vCenter(s) aggregation level com.snc.samp.oracle.hostaffinityenabled **Note:** This property is available only if you have activated the Software Asset Management publisher pack for Oracle. **Note:** This property supports domain separation by using the domain separation application properties for Software Asset Management. See Set up domain-specific reconciliation properties for Oracle for more details.	Enables the Software Asset Management application to account for VM-Host affinity rules when reconciling Oracle Database and WebLogic Server licenses within VMware vCenter Server instances. This property is applicable only if you set the aggregation level for Oracle reconciliation to **vCenter(s)** in the **Select the level of aggregation for reconciling licenses for Oracle databases and WebLogic servers on VMware** property. VM-Host affinity rules enable you to specify the physical ESXi hosts on which your virtual machines can run. If provisions are made for VM-Host affinity rules in your Oracle license agreement, you can lower your licensing obligations by accounting for these rules when licensing your Oracle Database and WebLogic servers.
Automatically create software models for all 'not licensable' products com.snc.samp.automaticsmcreation	Automatically creates a software model, in a non-compliant state, for any unlicensed installations (of not-licensable products) in the Product Results list. The new software model is used by Application Portfolio Management. Default is No.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
Enter the name of the true/false field added to cmdb_ci_hardware table to exclude software installed on selected devices from Software Asset Management com.snc.samp.exclude_device_flag	Excludes the software installed on devices (from the Software Asset Management application) where the Exclude from SAM column is set to true when you enter the column name, exclude_from_sam.
Enter the license period (in days) to be considered during reconciliation, for applications published on Citrix environment com.snc.samp.citrix.app.license.period **Note:** This property is available only if you have activated the Software Asset Management publisher pack for Citrix.	Indicates the license period (in days) for Citrix applications to be considered during reconciliation. Default is 90 days.
Enter the timeout period (in days) to resolve reclamation errors before the reclamation flow moves to the Closed canceled state sam_reclamation_flow_error_timeout	Indicates the timeout period (in days) to resolve reclamation errors before the reclamation flow moves to the Closed canceled state. The default value is 30 days.
Enter the period (in days) to be considered for peak usage consumption, for engineering applications. com.snc.samp.eng.app.peak.usage.period	Indicates the period (in days) for engineering applications to be considered for peak usage consumption. The default value is 30 days and only a user with the sam_admin role can update this field.
Enter the number of scheduled jobs to run in parallel for reconciliation. com.snc.samp.recon.max_workers	Indicates the number of scheduled jobs that run in parallel to reconciliation. Several scheduled jobs run reconciliation for different publishers simultaneously.
Indicates whether Wide-Net Normalization is enabled on the instance. If enabled, Wide-Net Normalization rules/patterns are applied on discovery models that haven't been fully normalized by regular package normalization rules. com.snc.samp.wide_net_normalization.enabled	Enables wide-net normalization to be performed on discovery models. This property is enabled by default. Wide-net normalization is performed only on discovery models that couldn't be normalized using content rules.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
	Only users with an admin role can modify the property.
Enable ML Normalization for discovered software. com.snc.samp.enable.ml_normalization	Enables machine learning normalization to be performed on discovery models. This property is enabled by default. Machine learning normalization is performed only on discovery models that couldn't be normalized using content rules. Only users with an admin role can modify the property.
Enter the threshold period (in days) after which billing data pulled from Cloud is considered old. This affects the license type confidence. com.snc.samp.sam_ci_billing_threshold	Indicates the threshold period, based on the number of days after which the billing data that is pulled from Cloud Insights is considered old. Cloud Insights is used to determine the license type for SQL Server installed on AWS. The default value is 30 days and this property is activated by default.
Red Hat Enterprise Linux Server for Virtual Datacenters license cost optimization threshold **Note:** This property is available only if you have activated the Software Asset Management publisher pack for IBM.	Determines whether you should use RHEL Server or RHEL for Virtual Datacenters licenses for your RHEL deployment. The default threshold value is 3.2. This value is based on the ratio of the current RHEL Server subscription list price to the current RHEL for Virtual Datacenters subscription list price. If your entitlements contain different pricing for these products, you can calculate this value by dividing your RHEL for Virtual Datacenters subscription price by your RHEL Server subscription price. See Software Asset Management for Red Hat

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
	Enterprise Linux for more information about how you can use this threshold value to determine the most optimal license type for your RHEL deployment.
Microsoft Windows Server for Datacenter license cost optimization threshold com.snc.samp.windowserver.license.threshold **Note:** This property is available only if you have activated the Software Asset Management publisher pack for Microsoft.	Determines whether it's more cost-effective to license the physical hosts or virtual machines (VMs) within your Microsoft Windows Server clusters based on the cost ratio between Microsoft Windows Server Datacenter Edition licenses and Microsoft Windows Server Standard Edition licenses. Based on the current list price of each license type, the default cost ratio value is 4.59. If your entitlements contain different pricing for these license types, you can modify this value by dividing the average price of your Microsoft Windows Server Datacenter Edition licenses by the average price of your Microsoft Windows Server Standard Edition licenses.
Default Region for IBM Devices sn_samp_ibm_lic.default_region **Note:** This property is available only if you have activated the Software Asset Management publisher pack for IBM and installed the IBM License Compliance for Software Asset Management application. For details on how to install the application, see Request the IBM License Compliance for Software Asset Management application for Authorized Software Asset Management Provider (ASP) integrations.	Automatically associates physical hosts with a default region if they aren't already associated with one. IBM license usage can be calculated only for physical hosts that are associated with a region. The default value is **North America and South America**.
Connect to ILMT using sn_samp_ibm_lic.ilmt_api_version	Indicates which version of the IBM License Metric Tool (ILMT) or BigFix Inventory integration APIs you're using to create a connection between your IBM servers

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
Note: This property is available only if you have activated the Software Asset Management publisher pack for IBM.	and the ServiceNow AI Platform platform.
Ratio of the entitlement cost of a Microsoft SQL Server Standard with Software Assurance to the cost of Microsoft SQL Server Enterprise with Software Assurance com.snc.samp.sqlserver.standard_sa.to.enterprise_sa.cost.ratio **Note:** This property is available only if you have activated the Software Asset Management publisher pack for Microsoft.	Determines whether it's more cost-effective to license the physical hosts or virtual machines (VMs) within your Microsoft SQL Server clusters based on the cost ratio between Microsoft SQL Server Standard Edition licenses with Software Assurance and Microsoft SQL Server Enterprise Edition licenses with Software Assurance. Based on the current list price of each license type, the default cost ratio value is 0.25. If your entitlements contain different pricing for these license types, you can modify this value by dividing the price of your Microsoft SQL Server Standard Edition licenses with Software Assurance by the price of your Microsoft SQL Server Enterprise Edition licenses with Software Assurance.
Ratio of the entitlement cost of a Microsoft Software Assurance entitlement to the cost of a Microsoft Non-Software Assurance entitlement com.snc.samp.ms.sa.to.nonsa.cost.ratio **Note:** This property is available only if you have activated the Software Asset Management publisher pack for Microsoft.	Determines whether it's more cost effective to use licenses with or without Microsoft Software Assurance on your Microsoft SQL Server clusters. The Software Asset Management application makes this determination based on the cost ratio between Microsoft SQL Server licenses with Software Assurance and without Software Assurance. Based on the current list price of each license type, the default cost ratio value is 1.25. If your entitlements contain

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
	different pricing for these license types, you can modify this value by dividing the price of your Microsoft SQL Server licenses with Software Assurance by the price of your Microsoft SQL Server licenses without Software Assurance.
com.snc.samp.use_lifecycle_approximation	Determines whether to include approximate life cycle dates when generating the life cycle report. This property is enabled by default. When selected, this property includes Software Product Lifecycle records that have the **Lifecycle Code** field populated when the Software Lifecycle Report is generated.
com.snc.samp.generate.calculated.lifecycles	Creates calculated lifecyles. To enhance lifecycle coverage beyond approximated lifecycle data, the system calculates EOS, EOES, and EOL dates by applying software lifecycle averages, measured in months, from the GA dates. When selected, this property enables generating calculated lifecycle dates based on Lifecycle averages defined for either the product, publisher, or industry averages.
com.snc.samp.manage.published.products	Enables you to publish software products in the phase-wise Software Asset Management implementation and also remove the published software products. The default value of this property is **false**. By setting the value of this property to **true**, you can view reports and dashboards only related

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Properties for Software Asset Management (continued)

Property	Description
	to the software products that you manage in a phase-wise implementation of Software Asset Management in the following views of the Software Asset Workspace: • Software asset overview • License usage view
samp.spend_prediction_service.max_label_attempts	Sets the maximum number of times the *SAM - Label Spend Transactions* scheduled job attempts to label a pending spend transaction. The default value is 3.

Related topics

- Configuration Console for Software Asset Management
- Configuration Console overview
- Configure Software Asset Management using the Configuration Console

Components installed with the Microsoft SCCM software usage plugin

Several types of components are installed with activation of the Microsoft SCCM software usage plugin.

Installed with SCCM Software Usage plugin

	SCCM 2012 v2	SCCM 2016
Data source	• SAMP Usage (Total usage) • SCCM 2012 v2 Software Last Used (Last used)	• SAMP Usage 2016 (Total usage) • SCCM 2016 Software Last Used (Last used)
Scheduled imports	• SAMP Usage Import • SCCM 2012 v2 Software Last Used	• SAMP Usage 2016 Import • SCCM 2016 Software Last Used
Transform map	• SAMP usage import (Total usage) • SAMP last used data import (Last used) (An onComplete transform script is associated with the transform map)	• SAMP usage import 2016 (Total usage) • SAMP last used data 2016 import (Last used)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Installed with SCCM Software Usage plugin (continued)

	SCCM 2012 v2	SCCM 2016
		(An onComplete transform script is associated with the transform map)
Script include	SAMPUsageUtil	SAMPUsage2016Util

If you've activated the Integration — Microsoft SCCM 2012 v2 Software Usage (com.snc.samp_usage_sccm) plugin, navigate to **Integration — Microsoft SCCM 2012 v2** > **Scheduled Import**.

SCCM data imported for SCCM 2012 v2

	SCCM table	Staging table	Target table
Total usage	v_MonthlyUsageSummary	Software usage import [imp_samp_usage_import]	Software Usage [samp_sw_usage]
Last used	v_GS_CCM_RECENTLY_USED_APPS	SCCM 2012 v2 Software Last Used [imp_sccm2012v2_software_last_used]	Software Usage [samp_sw_usage]

If you've activated the Integration — Microsoft SCCM 2016 Software Usage (com.snc.samp.usage_sccm_2016) plugin, navigate to **Integration — Microsoft SCCM 2016** > **Scheduled Import**.

SCCM data imported for SCCM 2016

	SCCM table	Staging table	Target table
Total usage	v_MonthlyUsageSummary	Software usage 2016 import [imp_samp_usage_2016_import]	Software Usage [samp_sw_usage]
Last used	v_GS_CCM_RECENTLY_USED_APPS	SCCM 2016 Software Last Used [imp_sccm2016_software_last_used]	Software Usage [samp_sw_usage]

License calculation for SAP cloud use types

Use SAP S/4HANA cloud use types and their weighting factors to calculate Full Usage Equivalent (FUE) licenses for different types of users of SAP S/4HANA Cloud applications.

FUE licenses are allocated to different cloud use types, each with a specific weighting factor. For an overview of the FUE licensing framework, see Software Asset Management publisher pack for SAP.

A weighting factor determines how many FUE licenses a cloud use type consumes.

A single FUE license can be distributed across these four cloud use types:

- Self-Service Use: This use type applies to users who access SAP S/4HANA Cloud self-service portals to view data, run reports, and perform basic business processes. It supports lightweight administrative tasks like monitoring data consumption and managing use rights.
- Core Use: This use type includes all Self-Service rights and provides restricted access to SAP S/4HANA Cloud. Core users can view data, run reports, and perform basic business processes for routine tasks and targeted information access.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Advanced Use: This use type includes all Core Use rights and grants full access to SAP S/4HANA Cloud. Users can create and edit data, run reports, and use all available business processes to manage key business operations.
- Developer Use: This use type grants authorized users access to the development tools provided with the SAP S/4HANA Cloud ABAP environment.

Weighting factors

The following table lists the weighting factor for each cloud use type.

SAP cloud use types and weighting factors

SAP cloud use type	SAP cloud use type name	Weighting factor
Self-service	Cloud for Self-Service Use	30
Core	Cloud for Core Use	5
Advanced	Cloud for Advanced Use	1
Developer	Cloud, Developer Access	0.5

FUE license calculation

To determine the total number of FUE licenses required, use the following formula:

```
Total FUE = Σ (Users in a cloud use type ÷ Weighting factor of that use type)
```

The following example shows the FUE licenses required for each cloud use type:

FUE license calculation example

Cloud use type	Number of users	Weighting factor	FUE licenses required
Self-Service	270	30	9
Core	75	5	15
Advanced	40	1	40
Developer	10	0.5	20
Total FUE licenses required			84

A user can belong to more than one cloud use type but is counted as a single user. The assigned use type depends on the following rules:

- The Developer use type takes priority. For a user in the Developer use type, the assignment depends on the **SAP client** field on the SAP System Users [samp_sap_system_user] table:
  - If the **SAP client** field indicates a developer environment, the user is counted under the Developer use type.
  - If the **SAP client** field does not indicate a developer environment, licenses are not calculated for the user.
- For a user in a use type other than Developer, the use type is resolved by the following priority order, from highest to lowest:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Advanced
2. Core
3. Self-Service

   For example, a user who belongs to the Advanced and Self-Service use types is counted under the Advanced use type.

The calculation assigns users across use types to arrive at the lowest total number of FUE licenses required for your SAP S/4HANA Cloud, Private Edition users. Reconciliation compares this total with the purchased rights recorded in your software entitlements to determine your license compliance position.

Related topics

Software Asset Management publisher pack for SAP

License usage breakdown for CrowdStrike products

View the license usage breakdown for CrowdStrike products to understand how your license rights are used and the methodology behind license calculations.

View the license usage breakdown for your CrowdStrike products by navigating to the **Software Asset Workspace** > **License usage** > **Publishers**. Select the publisher card for CrowdStrike to view the license usage on the Publisher details page.

License usage breakdown

Field	Description
Sensor usage	The type of workload on which the CrowdStrike sensor is deployed.
Count	The number of licenses available for a workload.
License metric	License metric for CrowdStrike that identifies how licenses are measured, billed, and consumed for the workload. • **Reserved Hourly Average Sensor**: This metric counts the number of unique active endpoints per clock-hour and averages them over a rolling 28-day period. The count of **Reserved Hourly Average Sensor Licenses** resets at the start of each clock-hour. • **Sensor Subscription**: This metric calculates license usage by averaging endpoint counts over four consecutive weeks. Weekly endpoint counts are based on the total number of endpoints consumed in the previous seven days.

Related topics

View calculations for your licenses in workspace

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Discovery models fields

Discovery Models form and related list field descriptions.

Discovery Models form

Field	Description
Display name	Name of the discovery model as it appears in record lists. This value is generated automatically using the discovered publisher, discovered product, and discovered version.
Normalization status	Status of the normalization process: • Normalized • Partially Normalized • Publisher Normalized • Match Not Found • Manually Normalized • New **Note:** If a normalization suggestion record exists, a caution icon is shown next to the **Normalization status** field. The caution icon opens the Normalization Suggestion record for the discovery model.
Publisher	Normalized publisher of the software.
Product	Normalized product name of the software.
Version	Normalized version of the software product.
Discovered publisher	Discovered publisher of the software.
Discovered product	Discovered name of the software.
Discovered version	Discovered version of the software.
Additional Information	
Product type	• Child: Subcomponent of main software (not licensable). • Driver: Software product that controls a device. • Licensable: Software product that is licensable. • Not Licensable: Software product that is not licensable. • Patch: Software product designed to update, fix, or improve an existing computer program. • Unknown: Not discovered.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	For unknown product types, the product type can be changed to another value. When the product type is changed, the normalization status of the discovery model is updated to Manually Normalized. The reconciliation process only considers software discovery models that are licensable.
Platform	Platforms include: • Windows • macOS • UNIX
Language	Languages include: • Dutch • English • French • German • Italian • Spanish If discovered, more languages are generated.
Edition	Normalized edition of the software.
Full version	Normalized full version of the software.
Exclude from content service	Option that excludes the software discovery model details from being transferred to the Software Asset Management Content Service. The value is set on the custom product form. **Note:** This field is only shown for custom products when you have opted in to the Software Asset Management Content Service.

Additional Information section

Field	Description
Product type	• Child: Subcomponent of main software (not licensable). • Driver: Software product that controls a device. • Licensable: Software product that is licensable. • Not Licensable: Software product that is not licensable. • Patch: Software product designed to update, fix, or improve an existing computer program.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• Unknown: Not discovered. For unknown product types, the product type can be changed to another value. When the product type is changed, the normalization status of the discovery model is updated to Manually Normalized. The reconciliation process only considers software discovery models that are licensable.
Platform	Platforms include: • Windows • macOS • UNIX
Language	Languages include: • Dutch • English • French • German • Italian • Spanish If discovered, more languages are generated.
Edition	Normalized edition of the software.
Full version	Normalized full version of the software.
Exclude from content service	Option that excludes the software discovery model details from being transferred to the Software Asset Management Content Service. The value is set on the custom product form. **Note:** This field is only shown for custom products when you have opted in to the Software Asset Management Content Service.

Software Installation related list

Field	Description
Display name	Name of the software install as it appears in the record lists.
Publisher	Name of the publisher of the software.
Version	Version of the software.
Installed on	Name of the hardware the software is installed on.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software installation fields

Software Installation form and related list field descriptions.

The list view for software installations shows the total number of software installation records for your organization based on the value specified in the **SAM Workspace License operations list count limit** system property (*sn_sam_workspace.sam_license_operations_list_count*). The default value for the record count is set to **5000000**. However, the SAM administrator can set the value for the count in the system property as required. If there are less than five million records, then the exact count is shown. If there are more than five million records, then the count is shown as 5000000+. For more information on this system property, see Software Asset Management properties.

Note: This topic describes only the fields that are available on the Software Installation form. For details on all fields that are available on both the Software Installation form and the Software Installation [cmdb_sam_sw_install] table, see Software Installations Table Attribute Review.

Software Installation form

Field	Description
Display name	Name of the software installation as it appears in the record lists. Can be a combination of the discovered product name and edition.
Discovery model	Software discovery model that represents the installed software.
Publisher	Publisher of the software.
Version	Version of the software.
Edition Override	Override of the software edition setting. For Office 365 subscriptions, this field is set from the software subscriptions record. If the edition for the software was not discovered, you can edit this field to set the edition if you know it, so that reconciliation can be performed successfully.
Installation tab	
Prod id **Note:** This field has been deprecated. However, it still appears on the **Installation** tab with an empty value.	Unique ID for the product assigned by the manufacturer. Found through discovery.
Install location	Path under which the software is installed.
Install date	Date that the software was installed.
Revision	Revision of the software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Note: This field has been deprecated. However, it still appears on the **Installation** tab with an empty value.	
Instance key	Unique ID for the instantiation of the software. Automatically generated when the software is installed.
Installed on	Hardware on which the software is installed.
Uninstall string	Identifier used to uninstall the software.
ISO serial number	ISO number of the software.
Reconciliation tab	
Entitlement **Note:** This field has been deprecated. However, it still appears on the **Reconciliation** tab with an empty value.	The entitlement found to use with this installation.
Inferred suite	The inferred suite model this installation belongs to.
Omit from suites	Check box for not counting the software install as a component of a suite during reconciliation.

Software spend transaction fields

Software spend transaction form fields and their descriptions.

Software spend transaction form

Field	Description
Overview section	
Description	Short description of the transaction.
State	Current state of the transaction. This field is defaulted to New.
Vendor name	Name of the vendor associated with the transaction.
Is software	Indicates that the transaction is a software purchase.
Publisher	Publisher of the software product associated with the transaction.
Product	Software product associated with the transaction.
GL account	General ledger account associated with the transaction.
Amount	Transaction amount and currency.
Is managed	Indicates whether a software model exists for the detected product. If no software model exists, the transaction is treated as unmanaged spend.
Type	Type of the transaction. The values include:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• Expense • Accounts payable This field is automatically set to Expense.
Transaction date	Date of the transaction in YYYY-MM-DD format.
Type detail	Additional detail about the transaction type.
Source	System that the transaction data originated from.
More details section	
Imported cost center	Cost center value as received from the source import file.
Cost center	Cost center associated with the transaction.
Imported department	Department value as received from the source import file.
Department	Department associated with the transaction.
Imported location	Location value as received from the source import file.
Location	Location associated with the transaction.
Employee ID	Identifier of the employee associated with the transaction.
External ID	Identifier of the transaction in the source system.
Employee name	Name of the employee associated with the transaction.
Upload	Transaction import that the software spend transaction is associated with.
Employee email	Email address of the employee associated with the transaction.
Exclude from content service	Option to exclude the transaction from being shared with the Software Asset Management Content Library team.
Activity section	
Work notes	Notes about the transaction that are visible to all users within your organization.

Related topics

Create a spend transaction manually

Normalization statuses

Description of normalization statuses for discovery models.

When a discovery model is normalized, it is normalized to the version and full version. However, if the discovery model is partially normalized or publisher normalized, then the discovery model won't be updated to full version. If the discovery model is manually normalized, you can decide if you want it normalized to version and full version.

Normalization status can have six different results:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Status	Description
Normalized	A discovery model is fully normalized based on publisher, product, version fields. No fields are editable. Under specific conditions, certain fields that are typically read-only can be edited. If edited, the status changes to **Manually Normalized**. If only publisher and product fields are discovered, but the product type is Not Licensable, Child, Driver, or Patch, the status is **Normalized**.
Partially Normalized	A discovery model is partially normalized based on publisher and product fields only. In this case, the version field is editable and once that information is added the normalization status is changed to **Manually Normalized**.
Publisher Normalized	A discovery model that is partially normalized based on the publisher field alone. In this case, the version and product fields are editable, and once that information is added, the normalization status is changed to **Manually Normalized**.
Match Not Found	The normalization process could not match any of the three key fields of the discovery model with a rule in the Software Library. In this case, all key fields are editable and once the information is added the normalization status is changed to **Manually Normalized**. **Match Not Found** status could occur if a normalization rule for the software does not exist. For example, if the organization created custom software specific to the organization.
Manually Normalized	A discovery model is manually normalized when key fields in a **New**, **Match Not Found**, **Partially Normalized**, or **Publisher Normalized** discovery model are filled in manually.
New	The software discovery model has not yet run through the normalization process.

License metrics for Microsoft products

A detailed description of the license metrics that can be used with Microsoft products.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft products and Software Asset Management license metrics

Note: The support for Per Processor license metric for Windows Server is applicable for Zurich patch 4 and Software Asset Management (sn_itam_samp) 3.2.0 version onwards. If you have already upgraded to Zurich, you can install the Software Asset Management manually.

Product	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management
Windows Server **Note:** For legacy versions of Windows Server, refer to the Windows Server legacy versions table.	Data Center/ Standard	• Per Core • Per Processor • CAL licensing	• Per Core (with CAL) • Per Processor • User/Device CAL for CAL licensing
Microsoft System Center	Data Center/ Standard	• Server - use core based licensing (Server Management Licenses) • Client - Use Client Management Licenses	• Server MLs- Per Core (with CAL) • Client MLs- User/Device
Microsoft Exchange Server	Standard/ Enterprise	• Server licenses • CAL licenses	• Server (Per Instance) for Server licensing • User/Device CAL for CAL licensing
Microsoft Project Server	Standard/ Enterprise	• Server licenses • CAL licenses	• Server (Per Instance) for Server licensing • User/Device CAL for CAL licensing
Microsoft SharePoint Server	Standard/ Enterprise	• Server licenses • CAL licenses	• Server (Per Instance) for Server licensing • User/Device CAL for CAL licensing

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Product	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management
Microsoft SQL Server **Note:** For legacy versions of SQL Server, refer to the SQL Server legacy versions table.	Standard/ Enterprise	• Per Core • Server/CAL	• For Core licensing: Per Core • For Server/CAL: ○ Server (Per Instance) for Server licensing ▪ Use Server (Per Instance) for server licensing for Standard, Web, Business Intelligence Editions ▪ Use Server (Per Server) for Enterprise Edition legacy versions 1 **Note:** SQL Server Enterprise is licensed usually using the Per Core licensing model only. However if you have software assurance, you might follow Legacy Server/ CAL licensing models. ServiceNow recommends using the Server (Per Server) license metric on ServiceNow Software Asset Management. ○ User/Device CAL for CAL licensing
Microsoft Office 365	Enterprise E3/E5/ E1	User Subscription	User Subscription
Microsoft Office	Professional/ Standard	Per Device	Per Device
Windows 10	Enterprise Professional	Per Device	Per Device
Microsoft Dynamics CRM 365 Server (On Premise)		Server/CAL	Only requires User/Device CALs to be created. No Server license required.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Product	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management
Microsoft Dynamics 365 Operations Server (On Premise) ERP		Server/CAL	• Requires User/Device CALs to be created. • Server (Per Instance) for Server licenses
Microsoft 365	Enterprise E3/E5/F3	User Subscription	User Subscription
Core Infrastructure Suite	Data Center/ Standard	Per Core	Per Core (with CAL)

Windows Server legacy versions

Version	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management	Licensing rules
2003-2008 R2	Standard	Server	Server (Per Instance) + add User/Device CALs	Min: NA Virtualization: 1 VM per license. A single Standard Edition license server permits you to run one instance of the software in a physical or virtual OSE on the server. You need to assign a Standard Edition license for each running instance.
	Datacenter	Processor	Per Processor + add User/Device CALs	Minimum: 2 processor Virtualization: Unlimited When DataCenter Edition is licensed for every physical processor in a server, the server may run both in the physical OSE and in an unlimited number of Windows Server instances in virtual OSEs.
2012-2012 R2	Standard	Processor	Per Processor + add User/Device CALs	Minimum: 2 processors.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Version	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management	Licensing rules
				Virtualization: 2 VMs for each fully licensed server.
	Datacenter	Processor	Per Processor + add User/Device CALs	Minimum: 2 processors. Virtualization: Unlimited.
2016-2019	Standard	Per Core/CAL	Per Core (with CAL) + add User/ Device CALs	Minimum: 16 cores per server or 8 Per Processor. Virtualization: 2 VMs for each fully licensed server.
	Datacenter	Per Core/CAL	Per Core (with CAL) + add User/ Device CALs	Minimum: 16 cores per server or 8 Per Processor. Virtualization: Unlimited.

SQL Server legacy versions

Version	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management	Licensing rules
2005	Standard	• Server/CAL • Processor	• For Server/CAL use: Server(Per Instance) for Server licensing and User/Device CAL for CAL licensing. • Per Processor	A server licensing rule (for Workgroup, Standard, or Enterprise editions) is required for every operating system environment on which that edition pf SQL Server software or any of its components, such as Analysis Services, is running. A Processor license is required for each processor installed on each operating system environment running SQL Server or any of its components, such as Analysis Services.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Version	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management	Licensing rules
	Enterprise	• Server/CAL • Processor	• For Server/CAL use: Server(Per Instance) for Server licensing and User/Device CAL for CAL licensing. • Per Processor	Only for Enterprise edition: If all processors in a machine are licensed, you may run unlimited instances of SQL Server 2002 on an unlimited number of virtual operating environments on the same machine.
2008-2008 R2	Standard	• Server/CAL • Processor	• For Server/CAL use: Server(Per Instance) for Server licensing and User/Device CAL for CAL licensing. • Per Processor	• Server/CAL: Each server license for these editions permits you to run unlimited instances of the software in one OSE or virtual machine (VM). To run the software in additional OSEs or VMs, you require additional server licenses. • Processor license: Number of OSEs on which you can run SQL Server. Only Physical OSEs.
	Enterprise	• Server/CAL • Processor	• Use Server (per Server) for Server Licensing and User/Device CAL for CAL licensing. • Per Processor	• Server/CAL: Each server license for the Enterprise edition permits you to run unlimited instances of the software in up to four OSEs or VMs. • Processor license: Number of OSEs on which you can run SQL Server. Up to four OSEs per license.
	Datacenter	Processor	Per Processor	Processor license: Number of OSEs on which you can run the SQL Server: Unlimited. The Datacenter edition requires that all the physical processors on the server are licensed and at least two processor licenses are assigned to the server.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Version	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management	Licensing rules
2012-2014	Standard	• Server/CAL • Per Core	• For Server/CAL: Use Server (Per Instance) for server licensing and User/Device CAL for CAL licensing • Per Core	Core based licensing: **1.** Count the total number of physical cores in the server. Multiple the number of cores by the appropriate core factor to determine the total number of licenses required for the server. **Note:** The core factor used depends on the processor type deployed and a minimum of four core licenses is required for each physical processor on a physical server. **2.** To license individual VMs using the Per Core model, you must purchase a core license for each v-core (or virtual processor, virtual CPU, virtual thread) allocated to the VM, subject to a four core license minimum per VM. For licensing purposes, a v-core maps to a hardware thread. When licensing individual VMs, core factors do not apply.
	Enterprise	Per Core1	Per Core	Same as above.
2016-2019	Standard	• Server/CAL • Per Core	• For Server/CAL: Server (Per Instance) for server licensing and User/Device CAL for CAL licensing • For Core licensing: Per Core	• Server/CAL: Each server running SQL Server software requires a server license. • Per Core: A minimum of four core licenses are required for each physical processor on the server.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Version	Edition	Licensing model provided by Microsoft	Software Asset Management license metrics to be used on ServiceNow Software Asset Management	Licensing rules
	Enterprise	Per Core1	Per Core	Same as above. **Note:** If you are already using SQL Server Enterprise edition with (Server/CAL) server licenses with software assurance, continue to use the Server+CAL licensing model. Use license metric as Server (per Server) for Server Licensing and User/ Device CAL for CAL licensing. The new purchases for SQL Server Enterprise will be based only on the Per Core licensing model. For more information about licenses required for Server + CAL licensing model, see Licensing support for Microsoft SQL Server enterprise on Server+ CAL.

Licensing rules for BYOL and BYOS

View the bring your own license (BYOL) licensing rules for Microsoft and Oracle products in public cloud environments. In addition, view bring your own subscription (BYOS) licensing rules for Red Hat Enterprise Linux (RHEL) products in public cloud environments. Licensing rules can differ for virtual machines that reside on shared hosts or dedicated hosts across different cloud providers.

Licensing rules for Microsoft Windows Server and Microsoft SQL Server

Note: The following tables list only a subset of rules for Windows Server and SQL Server BYOL. Refer to the official Windows Server and SQL Server websites for the complete list of licensing rules.

Windows Server licensing rules

Cloud provider	Instance type	With software assurance	Without software assurance
AWS for Windows Server	Shared host	BYOL isn't supported because Windows	BYOL isn't supported.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Windows Server licensing rules (continued)

Cloud provider	Instance type	With software assurance	Without software assurance
		Server doesn't have license mobility rights.	
	Dedicated host	• BYOL is supported for purchases or software releases only before October 1, 2019. • License by physical host. • Unlimited virtualization for Windows DC for purchases before October 1, 2019.	• BYOL is supported for purchases or software releases only before October 1, 2019. • License by physical host. • Unlimited virtualization for Windows DC for purchases before October 1, 2019.
Microsoft Azure for Windows Server	Shared host	• BYOL is supported using Microsoft Azure Hybrid Benefits (AHB). • Enough eligible core licenses must be allocated to cover all cores on the virtual machines (VMs) that are running. • Each processor license is equivalent to 16 core licenses. • A minimum of eight core licenses are allocated for using AHB. • Windows DC allows concurrent or dual use rights.	BYOL isn't supported.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Windows Server licensing rules (continued)

Cloud provider	Instance type	With software assurance	Without software assurance
		Note: Microsoft Windows Server Data Center provides the option of dual use rights, enabling you to utilize your Windows Server licenses simultaneously on Microsoft Azure and on licensed servers within your data centers. This feature, Azure Hybrid Benefit is only available on Microsoft Azure. For more information, see Azure Hybrid Benefit for Windows Server. • Edition flexibility: Windows Standard can license Windows DC.	
	Dedicated host	• BYOL is supported using Microsoft Azure Hybrid Benefits (AHB). • License by virtual machine or available cores. Only for Windows DC.	• BYOL is supported for purchases or software releases only before October 1, 2019. • License for total physical cores for purchases before October 1, 2019.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Windows Server licensing rules (continued)

Cloud provider	Instance type	With software assurance	Without software assurance
		• Unlimited virtualization for Windows DC if licensing available cores. • Windows DC allows concurrent or dual use rights for virtual machines only. **Note:** Microsoft Windows Server Data Center provides the option of dual use rights, enabling you to utilize your Windows Server licenses simultaneously on Microsoft Azure and on licensed servers within your data centers. This feature, Azure Hybrid Benefit is only available on Microsoft Azure. For more information, see Azure Hybrid Benefit for Windows Server.	• Unlimited virtualization for Windows DC for purchases before October 1, 2019.
GCP for Windows Server	Shared host	BYOL isn't supported because Windows Server doesn't have license mobility rights.	BYOL isn't supported.
	Dedicated host	BYOL isn't supported.	BYOL isn't supported.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SQL Server licensing rules

Cloud provider	Instance type	With software assurance	Without software assurance
AWS for SQL Server	Shared host	• BYOL is supported via license mobility rights. • License virtual cores (vCPU) - minimum of four cores per virtual machine.	BYOL isn't supported.
	Dedicated host	• BYOL is supported via License Mobility rights. • License by physical host. • Unlimited virtualization (SQL Server Enterprise) for purchases before October 1, 2019.	• BYOL is supported for purchases or software releases only before October 1, 2019. • License by total physical cores for purchases before October 1, 2019. • Unlimited virtualization for Windows DC for purchases before October 1, 2019.
Microsoft Azure for SQL Server	Shared host	• BYOL is supported using Microsoft Azure Hybrid Benefits (AHB). • Edition flexibility: 1 SQL Enterprise license on-premise can cover 4 SQL Server Standard cores. Similarly, 4 SQL Server standard licenses on-premise can cover 1 SQL Server Enterprise. • License virtual cores (vCPU) - minimum of four cores per virtual machine.	BYOL isn’t supported.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SQL Server licensing rules (continued)

Cloud provider	Instance type	With software assurance	Without software assurance
	Dedicated host	• BYOL is supported using Microsoft Azure Hybrid Benefits (AHB). • License by virtual machine or available cores (SQL Server Enterprise). • License by virtual machine or total cores (SQL Server Standard). • Unlimited virtualization (SQL Server Enterprise) if licensing available cores.	• BYOL is supported for purchases or software releases only before October 1, 2019. • License by total physical cores for purchases before October 1, 2019.
GCP for SQL Server	Shared host	• BYOL is supported via license mobility rights. • License virtual cores (vCPU) - minimum of four cores per virtual machine.	BYOL isn't supported.
	Dedicated host	BYOL isn't supported.	BYOL isn't supported.

Licensing rules for Oracle Database and Oracle WebLogic Server

Note: The following tables list only a subset of rules for Oracle Database and Oracle WebLogic Server BYOL. Refer to the official Oracle Database and Oracle WebLogic Server websites for the complete list of licensing rules.

Note: Unless otherwise specified, licensing rules are the same for both AWS and Microsoft Azure.

Oracle Database licensing rules

Licensing type	Licensing rule
Per Processor licensing	Licensing is based on the number of vCPUs that the Oracle database is installed or running on. Different licensing rules are applied based on the Oracle Database version that is installed or running.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database licensing rules (continued)

Licensing type	Licensing rule
	Note: The Oracle Processor Core Factor Table is not applicable in cloud environments. **Oracle Database Standard Edition, Standard Edition One, and Standard Edition 2** Four vCPUs are equivalent to one socket, and one socket requires one license. The number of vCPUs is rounded up to the nearest multiple of four. For example, an Oracle database that is running on 10 vCPUs requires a total of three licenses. **Oracle Database Enterprise Edition** If hyper-threading is enabled, one license is required for every two vCPUs on which you install or run an Oracle database. If hyper-threading isn't enabled, one license is required for every vCPU on which you install or run an Oracle database.
Named User licensing	One license is required for every user or physical device that accesses an Oracle database. Different licensing minimums are applied based on the Oracle Database edition that your users and devices are accessing: **Oracle Database Standard Edition and Standard Edition One** These database editions don't have any licensing minimums. **Oracle Database Standard Edition 2** You must have a minimum of 10 licenses per eight vCPUs. **Oracle Database Enterprise Edition** You must have a minimum of either 25 licenses per vCPU or the total number of users and devices that are accessing this database edition. The licensing minimum is set to the larger of the two values.
Oracle Database option and management pack licensing	Database options and management packs must be licensed separately from database servers. The following database options and management packs aren't supported in cloud environments: • Oracle Real Application Clusters (RAC) • Oracle Data Mining • Oracle Change Management Pack • Oracle Provisioning and Patch Automation Pack for Database
Oracle Database option licensing for Active Data Guard	If you're using the Oracle Active Data Guard option on an Oracle Enterprise Edition database, the primary database instance and read replicas that are associated with that database each require one Oracle Database Enterprise Edition license and one Oracle Active Data Guard license.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle Database licensing rules (continued)

Licensing type	Licensing rule
	Note: The Active Data Guard option is available only on Oracle Database Enterprise Edition.
Unlimited License Agreement (ULA) licensing	Licenses that are acquired through an Unlimited License Agreement (ULA) are supported in authorized cloud environments. However, certification of these licenses isn't required at the end of the ULA term.
High availability (Multi-AZ) licensing	High availability, or Multi-AZ, deployments require twice the number of licenses as Single-AZ deployments so that they can account for standby Oracle Database instances.

In addition to these Oracle Database licensing rules, consider the following vCPU size limitations when you're setting up an Oracle deployment in the cloud. These size limitations can help you determine the maximum number of licenses that are supported on your cloud instances.

Note: The vCPU size limitations are the same for both AWS and Microsoft Azure

vCPU size limitations

Oracle Database edition	vCPU size limitation
Oracle Database Standard Edition	Oracle Database Standard Edition is supported only on cloud instances that have a maximum of 16 vCPUs.
Oracle Database Standard Edition One and Standard Edition 2	Oracle Database Standard Edition One and Standard Edition 2 are supported only on cloud instances that have a maximum of eight vCPUs.
Oracle Database Enterprise Edition	Oracle Database Enterprise Edition is supported on all cloud instances, regardless of the vCPU count.

Oracle WebLogic Server licensing rules

Licensing type	Licensing rule
Per Processor licensing	Licensing is based on the number of vCPUs that the Oracle WebLogic server is installed or running on. Different licensing rules are applied based on the Oracle WebLogic Server version that is installed or running. **Note:** The Oracle Processor Core Factor Table is not applicable in cloud environments. **Oracle WebLogic Server Standard Edition** Four vCPUs are equivalent to one socket, and one socket requires one license. The number of vCPUs is rounded up to the nearest multiple of four. For example, an Oracle WebLogic server that is running on seven vCPUs requires a total of two licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Oracle WebLogic Server licensing rules (continued)

Licensing type	Licensing rule
	Oracle WebLogic Server Enterprise and Suite Edition If hyper-threading is enabled, one license is required for every two vCPUs on which you install or run an Oracle WebLogic Server. If hyper-threading isn't enabled, one license is required for every vCPU on which you install or run an Oracle WebLogic server.
Named User licensing	One license is required for every user or physical device that accesses an Oracle WebLogic server. Different licensing minimums are applied based on the Oracle WebLogic Server edition that your users and devices are accessing: **Oracle WebLogic Server Standard Edition** You must have a minimum of either 10 licenses per eight vCPUs or the total number of users and devices that are accessing this WebLogic Server version. The licensing minimum is set to the larger of the two values. **Oracle WebLogic Server Enterprise and Suite Edition** If hyper-threading is enabled, you must have a minimum of either 10 licenses per two vCPUs or the total number of users and devices that are accessing this WebLogic Server edition. If hyper-threading isn't enabled, you must have a minimum of either 10 licenses per vCPU or the total number of users and devices that are accessing this WebLogic Server edition. The licensing minimum is set to the larger of the two values.

Licensing rule for Red Hat Enterprise Linux Server

One on-premise subscription license is required for every two cloud-based virtual machines (VMs) on which you install and run Red Hat Enterprise Linux Server.

Note: This rule is only one of the licensing rules for Red Hat Enterprise Linux Server BYOS. Refer to the official Red Hat Enterprise Linux website for the complete list of licensing rules.

Software model fields

Software Model form and related list field descriptions.

After you fill a software entitlement with the correct PPN, a software model is automatically created. The tabs on the Software Model form, such as Suite Components, Suite Parents, Software Product Lifecycles, Metric Attributes, Downgrade Rights, Product Lifecycles for all Versions, and so on, are populated automatically. However, you can manually add or update the software model details based on your requirements.

Details tab

This list shows the details of a software model such as the status of the model, product details, licensing, conditions, and product catalog information.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Display name	Name of the model. The system property *glide.cmdb_model.display_name.shorten* controls how software model display names are generated. Users with the admin role can configure this property. The default format is publisher + product + version + edition + platform + language. If the **Platform** or **Language** fields aren't set to **Anything**, the values are appended.
Status	Status of the model. The options are **In Production**, **Retired**, and **Sold**.
Product Details section	
Publisher	Publisher of the software. You can use the lookup list provided. **Note:** Publisher is a reference to the company [core_company] table. Only companies that you're using internally are shown.
Product	Software product name. The same lookup list provided on the Software Discovery Models form. You can create a custom product from the lookup list, if desired. **Note:** If the relationship between the software publisher [samp_sw_publisher] and company [core_company] tables isn't correct, products for that publisher may not be shown. If the publisher and product don't exist, you can Add a custom software product in Software Asset Management classic.
Version condition	Condition qualifiers for the **Version** field. • **starts with** • **is** • **is anything** This field is automatically set to **is anything**.
Version	Version of the software product.
Edition condition	Condition qualifiers for the **Edition** field. • **starts with** • **is** • **is anything**
Edition	Edition of the software product to use when searching for the normalized discovery model.
Discovery map	A set of conditions that determine which software discovery models get mapped to the software models. Purchased rights are

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	only applied to software discovery models that meet the condition. This matching is important for reconciliation. Discovery models with predefined suites are indicated in the **Suite defined** field. A value of **Yes** indicates that the discovery model is a suite parent. You can use the discovery maps provided, or you can choose to specify the condition information directly instead. A user with the sam_admin role can choose to create a custom discovery map. When you select a discovery map, you may encounter a message: `Many underlying software models will be created. These might be part of suite components, downgrade rights or next version. Please validate on completion`. The message appears only if there are greater than or equal to 50 suite components for the software model and if any of the following conditions are met: • A software model doesn't exist for any suite component • A software model doesn't exist for any downgrade rights • A software model doesn't exist for the next version **Note:** If you change the discovery map in an existing software model, a warning message appears. The warning message informs you that the downgrade rights on the software model and on the related entitlements also change. For example, if you change the discovery map on a software model from DMAP1 to DMAP2, and save the software model, then all the downgrade rights associated with DMAP1 are removed from the software model and the downgrade rights associated with DMAP2 are populated. However, if the value in the **Agreement type** field in the Software Entitlement form layout is **Generic**, the downgrade rights for that entitlement don't change. You can verify which discovery models get mapped to the software model by selecting the **Show Matching Discovery Models** related link in Software Asset Management classic. View the same results in the Software Asset Workspace, by navigating to **License operations** > **Licensing** > **Software models**. Select a software model and then select the **Matching Discovery Models** related list. If the **Publisher** and **Product** fields are empty, the values are automatically populated according to the discovery map.
Next version	Reference to another software model of the same manufacturer, which represents the next version of the product. The next version is defined on the discovery map and is part of the content service. The next version is populated on the software model in either of the two ways:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• When you create a software model or update the discovery map on a software model, a business rule is triggered when you select **Save**. The next version is populated if the discovery map has a next version defined for it. • If the content service has the next version specified for the associated discovery map on an existing software model, the next version is populated when the schedule job *SAM- Create downgrades/upgrades for a software entitlement* runs. **Note:** The next version is populated only after the *SAM- Create downgrades/upgrades for a software entitlement* scheduled job runs weekly. However, if you entered a value in the **Next version** field, that value isn't overridden.
Product classification	The official United Nations Standard Products and Services Code (UNSPSC) classification. From this release, product classifications have been enhanced with a comprehensive set of UNSPSC codes available via the Content Service library. Updates to the UNSPSC codes will also be available via the bi-weekly Content Service library update.
Software Licensing section	
Product type	Product type values include: **Child**, **Driver**, **Licensable**, **Not Licensable**, **Patch**, and **Unknown**. **Note:** The reconciliation process only considers software products that are licensable.
License under management	Option to manage licenses for the specified software. If you clear this option, your software model won't be included in your reconciliation results. This option is selected by default. It's also selected for any software models that have been upgraded. If you upgrade and have software models with this option selected, you can do a bulk update and clear the **License Under Management** option from any software models that you don't want to include in your reconciliation results. When you run reconciliation again, only the software models with the option still selected will display in your results.
Owner	Person responsible for the model.
Unit of consumption	Unit of measure for the software units that can be consumed.
Conditions section	
Condition name	Name of the condition that you want to define for the software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Software install condition	Condition to account for only specific software installations during reconciliation. Installs that do not meet the required software install conditions will be included in the reconciliation process. However, these installs are likely to be flagged as unlicensed unless there is another software model that meets the required software install conditions. For example, if you have purchased Microsoft Visual Studio and set up software installation conditions for using Visual Studio only to consume licenses in your non-production environment. You need to create separate software install conditions for each component model under Visual Studio. **Note:** If you clear the **License under management** option, the software installations that meet the specified software install conditions are excluded from reconciliation instead. In the Software Asset Management classic application, you can add multiple software install conditions to a single software model using the following options: • **Add Filter Condition**: Enables you to specify all the conditions that a software installation must meet to be included in reconciliation. • **Add "OR" Clause**: Enables you to specify any of the conditions that a software installation can meet to be included in reconciliation. In the Software Asset Workspace, you can add multiple software install conditions to a single software model using the following options: • **or**: Enables you to specify any of the conditions that a software installation can meet to be included in reconciliation. • **and**: Enables you to specify all the conditions that a software installation must meet to be included in reconciliation. • **+ New condition set**: Enables you to specify additional sets of conditions that a software installation can meet to be included in reconciliation.
Subscription condition **Note:** This field appears only on subscription-based software models, including hybrid software models that contain both software subscriptions and on-premise software installations.	Condition to account for only groups of subscriptions during reconciliation. Only the subscriptions that meet the specified subscription conditions are included in reconciliation. For example, you can set a subscription condition to reconcile subscriptions from only a specific geographic location or business department. **Note:** If you clear the **License under management** option, the subscriptions that meet the specified software conditions are excluded from reconciliation instead. In the Software Asset Management classic application, you can add multiple subscription conditions to a single software model using the following options:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Add Filter Condition**: Enables you to specify all the conditions that a subscription must meet to be included in reconciliation. • **Add "OR" Clause**: Enables you to specify any of the conditions that a subscription can meet to be included in reconciliation. In the Software Asset Workspace, you can add multiple subscription conditions to a single software model using the following options: • **or**: Enables you to specify any of the conditions that a subscription can meet to be included in reconciliation. • **and**: Enables you to specify all the conditions that a subscription must meet to be included in reconciliation. • **+ New condition set**: Enables you to specify additional sets of conditions that a subscription can meet to be included in reconciliation. ⚠ **Warning:** You can't add subscription conditions to out-of-the-box software models. You must create a software model to define subscription conditions for the associated subscription software.
General section	
Short description	Brief description of the model.
Platform	Platform of the software product to use when searching for the normalized discovery model. The default is **Anything** for Windows, macOS, UNIX.
Language	Language of the software product to use when searching for the normalized discovery model, which is populated after it has been normalized or added manually. This field is automatically set to **Anything**.
Cost	Cost of a single unit of the software.
Certified	Option to indicate if the product associated to this software model is approved or unapproved by TRM. When a enterprise architect adds a product to the TRM library, the product is flagged as either approved or unapproved. When a software model is created for an approved product, this check box is automatically selected. If you create a software model for an unapproved product, the software model is designated as restricted. During the reconciliation process, any software installations associated with unapproved products are identified as removal candidates. If you activate the Application Portfolio Management - TRM (com.snc.apm_trm) plugin for software models that exist, this

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	check box may or may not be selected depending on whether the product is approved.
Restricted software	Option for restricting software. Restricted software identifies software that you shouldn't install in your environment (inappropriate software, or software with vulnerabilities, for example). If the removal candidates don't exist, a scheduled job runs nightly that creates removal candidates for restricted software.
License all installs **Note:** This field appears only on software models that are associated with resource value and client access records, except for Oracle Database software models.	Option to license the configuration items (CIs) that the software is installed on, based on conditions that you specify on the software model, such as software install conditions. If any of the associated client access records are unlicensed due to insufficient rights, all CIs remain unlicensed. If you disable this option, only the CIs that have been added to your client access records are licensed. See Add a software client access record in Software Asset Management classic for detailed instructions on how to add CIs to your client access records. If you enable this option after you have already added CIs to your client access records, those CIs are deleted from your records and then subsequently licensed based on the conditions that you specify on the software model.
Database option **Note:** This field appears only on Oracle Database software models.	Oracle database option or management pack. Each option or pack requires a separate software model. The database option is an identifier for software models. This field is shown when creating software models that meet the following conditions: • The **Publisher** is **Oracle**. • The **Product** is **Database**.
Database option condition **Note:** This field appears only on Oracle Database software models that are associated with a database option or management pack, as specified in the **Database option** field.	Condition to account for only the subsets of Oracle Database options or management packs during reconciliation. Only the database options or management packs that meet the specified database option conditions are included in the reconciliation. **Note:** If you clear the **License under management** option, the database options or management packs that meet the specified database option conditions are excluded from reconciliation instead. In the Software Asset Management classic application, you can add multiple database option conditions to a single software model using the following options:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Add Filter Condition**: Enables you to specify all the conditions that a database option or management pack must meet to be included in reconciliation. • **Add "OR" Clause**: Enables you to specify any of the conditions that a database option or management pack can meet to be included in the reconciliation. In the Software Asset Workspace, you can add multiple database option conditions to a single software model using the following options: • **or**: Enables you to specify any of the conditions that a database option or management pack can meet to be included in the reconciliation. • **and**: Enables you to specify all the conditions that a database option or management pack must meet to be included in reconciliation. • **+ New condition set**: Enables you to specify additional sets of conditions that a database option or management pack can meet to be included in reconciliation.
Apply to subscriptions	Option to apply this software model to only subscription-based software suites. If you don't enable this option, you can apply this software model to only software suites with installed software.
Auto-generate client access for allocations. **Note:** This field appears only on Oracle Database software models. **Important:** To use this option, you must request the Data Collection for Oracle Global Licensing and Advisory Services (GLAS) application from the ServiceNow Store. For details, see Request Data Collection for Oracle Global Licensing and Advisory Services (GLAS).	Option to automatically generate and manage client access records for Oracle Database. If you enable this option, the Software Asset Management application generates and manages client access records based on your latest Oracle Database Named User Plus entitlements, the users, and devices that the associated rights are allocated to, and the Oracle database instances that are supported by these users and devices. The Software Asset Management application generates a separate client access record for each supported database instance. If you disable this option after the Software Asset Management application has automatically generated client access records for Oracle Database, those client access records are no longer managed and updated automatically. You must manage and update those client access records manually to keep them accurate and upto date. If you enable this option and already have existing client access records for Oracle Database, all automatically generated client access records are managed and updated automatically again. However, you must continue to manage and update all manually generated client access records.
Product Catalog section	
Catalog Item	Information about the model as it appears in the product catalog and service catalog.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Information only appears if the model has been published to the product catalog.
Description	Description of the software model as it appears in the product catalog.
Picture	Image of the software logo that can be added. This logo appears in the service catalog if the software model is published.
Activity section	
Work notes	Notes about the work order task that are visible to all users within your organization.

Suite Components tab

This list shows the software suite component details. Software components are the suite children of a software suite parent. For more information, see Software Asset Management software suites.

Field	Description
Suite child	Child product or products of the suite. For example, Microsoft Word and Microsoft Excel are child products of Microsoft Office.
Mandatory	Requirement of a suite component. A suite component can be **Optional**, **Always Mandatory**, or **Mandatory Group**. Set to **Always Mandatory** if the software must be installed to count the model as a suite.
Suite relationship assumed	Relationship that indicates that multiple software models exist for one or more of the suite components. Therefore, the relationship between suite parent and suite component was assumed. Review the created suite components to ensure that the relationship is correct.
Suite Content Usage section	
Inference Option: **Number** and **Percent**	**Number**: Specifies the number of components installed for the suite. Specify a number lesser than or equal to the number of components. **Note:** For any new software models being created with suite components, the **Number** option is selected by default. **Percent**: Specifies the percentage of the components that must be installed for the suite. **Note:** For existing software models with suite components that were using the inference percent, the **Percent** option is selected by default. However, you can choose to use the **Number** option. If the system property `com.snc.sam.auto_suite_inference` is set to true, the Inference number and percent is automatically determined and

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	the parent software model suite is automatically inferred for a software model based on its child software models.
Allow automated content update	Option to enable automatic content changes to software models.
Automatic determination of inference	Option to enable automatic determination of the inference number and percent. You can override this option to continue with the manual calculation of Inference percent.

Suite Parents tab

This list shows the software suite parent details. For more information, see Software Asset Management software suites.

	Description
Suite parent	Parent suites to which the software is assigned. For example, the parent suite for several common Microsoft products is a version of Microsoft Office.
Suite child	Child product or products of the suite. For example, Microsoft Word and Microsoft Excel are child products of Microsoft Office.
Mandatory	Requirement of a suite component. A suite component can be **Optional**, **Always Mandatory**, or **Mandatory Group**. Set to **Always Mandatory** if the software must be installed to count the model as a suite.
Suite relationship assumed	Relationship that indicates that multiple software models exist for one or more of the suite components. Therefore the relationship between suite parent and suite component was assumed. Review the created suite components to ensure the relationship is correct.

Software Product Lifecycles

This list shows the life cycle information of a software product. For more information on life cycles, see Product life cycles.

Field	Description
Publisher	Name of publisher.
Product	Name of the software product.
Version	Licensable version of the software
Edition	Edition of the software.
Full Version	The granular licensable version of the software.
Phase start date	Date when the life-cycle phase starts.
Lifecycle type	The product life cycle type values include:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Internal**: The life cycle date is specific to the customer (for example, based on their internal policy, based on a custom contract/ agreement with the publisher). • **Publisher**: The life cycle date comes from publisher sources and is not specific to a customer. • **Publisher Add-On**
Risk	The risk level to an organization with regards to the life-cycle phase. For example, the risk for the end of support phase for a publisher maybe moderate or the end of life phase may be high. Risk type values include: • **Very High** • **High** • **Moderate** • **Low** • **None**
Lifecycle phase	Life-cycle phase values include: • **Pre Release**: Date when the software was pre-released. • **General Availability**: Date when the software became generally available to the market. • **Upgrade** **Note:** Only shown when the **Lifecycle type** field is Internal. • **End of Support**: Date by which the software will not be enhanced by the publisher. This value corresponds to the Mainstream Support end date for Microsoft according to its Fixed Lifecycle Policy. • **End of Extended Support**: Date by which the publisher will no longer provide any support or updates to the software. This value corresponds to the Extended Support end date for Microsoft according to its Fixed Lifecycle Policy.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **End of Life**: Date by which the software will no longer be manufactured by the publisher. **Note:** This value isn't applicable for Microsoft because it follows the fixed lifecycle policy providing mainstream support and extended support. For more information, see Fixed Lifecycle Policy.
Active	Indicates if the life cycle is to be considered or not while evaluating the risk of the software. **Note:** By default, only active life cycles are displayed.
Source	Source of the life cycle. If the record is created manually, this field is set to **Internal**. If the record is created automatically, this field is set to **ServiceNow**.
Description	Description of the software product life cycle.

Software Entitlements tab

This list shows the entitlement terms of your software license. For more information, see the Software entitlements section in Software models and software entitlements.

Field	Description
Display name	Automatically generated name based on the software model display name.
License metric	License metric for the license group that the software license is counted against when reconciliation is run. The options for license metric change based on the Metric group field. For more information, see Software license metrics.
Metric group	Metric group based on the Software Model field. Each metric group has a set of license metrics that are specific to the software publisher.
License type	The type determines whether the rights grant full access to the software or if they're being upgraded from a previous version of the software. The following are the various license types: • Perpetual • Perpetual + Software Assurance • Software Assurance

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• Subscription • Step-up • Subscription Step-up
Active rights	Number of rights granted for this entitlement.
Purchased rights	Number of rights purchased for this entitlement.
Total cost	Total cost of the entitlement calculated from the unit cost.

Override License Costs tab

This list shows the override license cost information for your software entitlements.

Field	Description
Software Model	Software model that the software entitlement belongs to.
Metric Group	Metric group that the software entitlement belongs to.
License Metric	License metric specified for the software entitlement.
License Cost	Cost of the license.
License & Maintenance Cost	Cost of the license combined with cost of the maintenance license. Specify a license cost or a license and maintenance cost, to override the true-up cost during reconciliation. If no values are specified in the **License Cost** or **License & Maintenance Cost** fields, the software entitlement cost is used for true-up cost calculations. **Note:** For SaaS licenses, only the license cost applies. The license & maintenance cost does not apply.
The following fields appear when the value selected in the License Metric field is Employee.	
Active	Indicates whether the license cost is to be considered for true-up cost calculations.
Lower limit	Minimum number of employees that the licenses are required for.
Upper limit	Maximum number of employees that the licenses are required for.

SAP Engine Usages tab

This list shows the license usage for SAP Engines.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Name	Name of the license usage record. Select a name to open the record to view detailed information such as the associated software model and SAP client.
Count	Number of unique users or devices that are granted access to the SAP Engine product.
Type	Type of CAL that is associated with the license usage record. • **User CAL**: Licenses each user that accesses the associated server, regardless of the number of devices that each user is using to access the server. • **Device CAL**: Licenses each device that accesses the specified server, regardless of the number of users that are using each device to access the server. • **User/Device CAL**: Licenses each user or device that accesses the associated server.
Usage	Total memory usage of the SAP Engine product in gigabytes (GB).
Cost Center	Cost center of the users or devices that are granted access to the SAP Engine product.
Department	Business department of the users or devices that are granted access to the SAP Engine product.
Location	Geographic location of the users or devices that are granted access to the SAP Engine product.
Company	Company of the users or devices that are granted access to the SAP Engine product.

Software Model Results tab

This list shows the software model results associated with the license metric results.

Note: Software model results (SMRs) are not generated for software models for Oracle Database options without associated software entitlements. You can set the system property *com.snc.samp.unlicensed_smr_creation* to **True** to create SMRs for these models even if there are no entitlements.

Field	Description
Status	Status of the software model. Possible values are **Compliant** or **Not Compliant**. Select the **Status** field to open the corresponding Software Model Results record, where you can view more in-depth information about the software model result.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	See View software model results for detailed descriptions of each field on the Software Model Results form.
Agreement type	Agreement type that is set on the software entitlement. • Common: Generic, Enterprise License Agreement (ELA) • IBM: Generic, Enterprise License Agreement (ELA), International Program License Agreement (IPLA), IBM Customer Agreement (ICA), Unlimited Level Agreement (ULA) • Microsoft: Generic, Enterprise License Agreement (ELA) • Oracle: Generic, Unlimited Level Agreement (ULA) • VMware: Generic, Enterprise License Agreement (ELA), Enterprise Purchasing Program (EPP), Volume Purchasing Program (VPP) **Note:** If the agreement type is Enterprise Level Agreement or Unlimited Level Agreement, the **Status** is Compliant even if there are unlicensed installations or unlicensed subscriptions.
Unlicensed installs	Number of unlicensed software installations that are not covered by any entitlements.
True-up cost	Estimated cost of remediating unlicensed installations based on the lowest number of rights needed (rights needed times average price per right from entitlements). The lowest cost from Purchase Rights remediation options.
Over-licensed amount	Estimated cost of rights not being used. The sum of the Over Licensed amount from the True-up value costs.
Potential savings	Cost saved by optimizing unused licenses.
Group	Group specified on which to run reconciliation. Values include: • None • Country • Department • Company • Region • Cost Center
Subgroup	Subgroup specified on which to run reconciliation. Values include: • None • Country • Department • Company • Region • Cost Center

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Metric Attributes tab

This list shows the metric attributes information of a software model.

Field	Description
Software model	Software model associated with the metric attributes.
Metric group	Grouping for the software metric. If you have optional publisher packs installed that the software applies to, those options are shown. Otherwise, the metric group value is **Common**.
License metric	The license metric that the software license is counted against when reconciliation is run (per user, per device, for example).
Description	Attribute type description that is based on the license metric value.
Attribute	Attribute type for reconciling entitlement license metrics. For more information on each attribute type, see Software model metric attributes.
Attribute value	Value of the attribute (integer).
Attribute value is unlimited	Option for setting the attribute as unlimited.

Vendor Catalog Items tab

This list shows you the details of the software models associated with a vendor. For more information, see Vendor catalog items.

Field	Description
Name	Name of the catalog item.
Product ID	Item identification number assigned by your organization.
Short Description	Brief description of the item.
Vendor Price	The price at which the item is available in the vendor catalog. If the vendor offers a discount, the vendor price reflects the discounted price.
Rank tier	Overall ranking for this vendor's products and services.

Client Access tab

This list shows a client access record details of the users or devices that are accessing a particular version of your server software using a client access license (CAL).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Name	Name of the client access record. Select a name to open the corresponding client access record, where you can view more in-depth information about the record, such as the users or devices that the associated client access licenses (CALs) are assigned to and the configuration items (CIs) that the associated server software is installed on. See Add a software client access record in Software Asset Management classic for more information on client access records in the Software Asset Management classic application. See Create a software client access record in workspace for more information on client access records in the Software Asset Workspace.
Count	Number of unique users or devices that are granted access to the associated server. **Note:** If you're using a Citrix software model and User/Device CAL type, the **Count** field is based on the number of user/device licenses that are assigned to your users or shared devices.
Type	Type of CAL that is associated with the client access record. • **User CAL**: Licenses each user that accesses the associated server, regardless of the number of devices that each user is using to access the server. • **Device CAL**: Licenses each device that accesses the specified server, regardless of the number of users that are using each device to access the server. • **User/Device CAL**: Licenses each user or device that accesses the associated server. **Note:** If you're using a Citrix software model, the User/Device CAL type is based on the user/device licenses that are assigned to your users or shared devices. • **Reserved Hourly Average Sensor**: This metric counts the number of unique active endpoints per clock-hour and averages them over a rolling 28-day period. The count of Reserved Hourly Average Sensor Licenses resets at the start of each clock-hour. • **Sensor Subscription**: This metric calculates license usage by averaging endpoint counts over four consecutive weeks. Weekly endpoint counts are based on the total number of endpoints consumed in the previous seven days. **Note:** The Reserved Hourly Average Sensor and Sensor Subscription license metrics are applicable only for CrowdStrike and are available with Yokohama Patch 1, Software Asset Management - SaaS License Management (sn_sam_saas_int) 15.0.8, and Software Asset Management (sn_itam_samp) 2.1.0 version onwards. If you are on any version for Yokohama below Patch 1, refer KB1801232.
Cost Center	Cost center of the users or devices that are granted access to the associated server.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Department	Business department of the users or devices that are granted access to the associated server.
Location	Geographic location of the users or devices that are granted access to the associated server.
Company	Company of the users or devices that are granted access to the associated server.

Software Subscriptions tab

This list shows the available subscriptions for a software application.

Field	Description
Display name	Software publisher and product for the subscription.
User principal name	User's email address for the subscription.
Software model	Software model for the subscription.
Last activity	Last date when this subscription was last used.
Inactive days	Number of days for which a user's subscription has been inactive. This field is visible on the Software Subscriptions form when the **Last activity** field is not empty. Inactive days are calculated using the value in the **Last activity** field.
Subscription profile	Profile that is associated with the subscription identifier.

Downgrade Rights tab

This list shows the downgrade rights information of a software model. For more information, see Downgrade Rights.

Field	Description
Parent software model	Parent (or the topmost hierarchy) of the software model.
Software model	Software model associated with the downgrade rights. Based on the parent software model that you select, the related software models appear in the list. For example, if you select Microsoft SQL Server 2012 Standard as the parent software model, only Microsoft -related software models appear in the list.
Source	Source of the downgrade rights. If the record is created manually, it's set to **Internal**. If

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	it's created automatically, the field is set to ServiceNow.
Active	Option that indicates if the downgrade rights on the software model are active or not. If needed, you can deactivate the downgrade rights. Only the active downgrade rights appear in the field. To see all the downgrade rights, remove the Active condition from the filter. If you deactivate a downgrade right on a software model, the change is propagated to the related software entitlement downgrade rights, irrespective of the source of the downgrade right. You cannot deactivate the downgrade right on a software model and keep the downgrade right activated on the software entitlement. To deactivate a downgrade right, double-click the field to display the toggle button, select **false**, and then select the Save icon ( ). • **false**: deactivates the downgrade right on the software model and on the related software entitlements. • **true**: reactivates the downgrade right on the software model and on the related software entitlements.

Matching Discovery Models tab

This list shows the discovery maps that match the software publisher and product fields of the software model.

Field	Description
Display name	Name of the discovery model. This value is generated automatically using the discovered publisher, discovered product, and discovered version.
Normalization status	Status of the normalization process: • Normalized • Partially Normalized • Publisher Normalized • Match Not Found • Manually Normalized • New
Publisher	Normalized publisher of the software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Product	Normalized product name of the software.
Version	Normalized version of the software product.
Edition	Normalized edition of the software.

Product Lifecycles for all Versions tab

This list shows the life cycle for all versions of the software product.

Field	Description
Publisher	Name of the publisher.
Product	Name of the software product.
Version	Licensable version of the software.
Full version	Granular licensable version of the software.
Edition	Edition of the software.
Lifecycle phase	Life-cycle phase values include: • **Pre Release**: Date the software was pre-released. • **General Availability**: Date the software became generally available to the market. • **Upgrade** **Note:** Only shown when the **Lifecycle type** field is Internal. • **End of Life**: Date by which the software will no longer be manufactured by the publisher. **Note:** This value isn't applicable for Microsoft because it follows the fixed life-cycle policy providing mainstream support and extended support. For more information, see Fixed Lifecycle Policy. • **End of Support**: Date by which the software will not be enhanced by the publisher. This value corresponds to the Mainstream Support end date for Microsoft according to its Fixed Lifecycle Policy.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **End of Extended Support**: Date by which the publisher will no longer provide any support or updates to the software. This value corresponds to the Extended Support end date for Microsoft according to its Fixed Lifecycle Policy.
Lifecycle type	The product life cycle type values include: • **Internal**: The life cycle date is specific to the customer (for example, based on their internal policy, based on a custom contract/ agreement with the publisher). • **Publisher**: The life cycle date comes from publisher sources and is not specific to a customer. • **Publisher Add-On**
Source	Source of the life cycle. If the record is created manually, this field set to **Internal**. If the record is created automatically, the field is set to **ServiceNow**.
Description	Description of the software product life cycle.
Phase start date	Date when the life-cycle phase starts.
Risk	Risk level to an organization with regards to the life-cycle phase. For example, the risk for the end of support phase for a publisher maybe moderate or the end of life phase maybe high. Risk type values include: • Very High • High • Moderate • Low • None
Active	Option to indicate if the life cycle is to be considered or not while evaluating the risk of the software. **Note:** By default, only active life cycles are displayed.

Group Allocations tab

This list shows the user groups allocated to the software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Assignment Group	Name of the user group assigned to this software entitlement. Software licenses are allocated to all the members of this assignment group based on the availability of unallocated licenses for the software entitlement.
Status	Current status of the group allocation to the software model. Possible values are: • **New**: When a group allocation is created, this field is automatically set to New. • **Not allocated**: None of the group members are allocated to the software entitlement. • **Fully allocated**: All the members from the user group are allocated to the software entitlement. • **Partially allocated**: A partial number of group members are allocated to the software model.
Active	Indicates if the user group allocation to the software entitlement is active. Possible values are: • **true**: The allocation record is active and users from the assignment group are allocated to the software entitlement. • **false**: The allocation record is inactive and the users from the assignment group aren't allocated to the software entitlement. When a user group is changed to inactive, the group allocation record is marked as inactive and the **Allocated Quantity** field value is updated.
License metric	User-based license metric for user allocation to the software entitlement. License metric values include: • Per Named User • Per User • User Subscription
Group Members	Number of users available in the assignment group.
Software model	Field value is automatically set to the selected software model.
Allocated Quantity	Number of users from the assignment group allocated to the software entitlement.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Entitlement condition	Entitlement condition defined to apply the group user allocation on the filtered software entitlements.

Group allocations fields

Group allocations form and related fields description.

Group allocations form

Field	Description
Assignment Group	Name of the user group to which license is allocated. Software licenses are allocated to all the members of this assignment group based on the availability of unallocated licenses for the software entitlement.
Status	Status of the group allocation to the software model. When a group allocation is created, this field is automatically set to **New**. When the group allocation record is saved and the Software Asset Management application allocates licenses, the **Status** field value is automatically updated based on the availability of unallocated licenses. Possible values are: • **Not allocated**: None of the group members are allocated to the software entitlement. • **Fully allocated**: All the members from the user group are allocated to the software entitlement. • **Partially allocated**: A partial number of group members are allocated to the software model.
Active	Option to indicate if the user group allocation to the software entitlement is active. When a group allocation is created, the **Active** field value is empty. When the record is saved, the **Active** field value gets updated. Possible values are: • **true**: The allocation record is active and users from the assignment group are allocated to the software entitlement. • **false**: The allocation record is inactive and the users from the assignment group aren't allocated to the software entitlement. When a user group is changed to inactive, the group allocation record is marked as inactive and the **Allocated Quantity** field value is updated.
License metric	User-based license metric for user allocation to the software entitlement. License metric values include: • Per Named User • Per User • User Subscription
Group Members	Number of users available in the assignment group. The number is automatically populated when the **Assignment Group** field value is selected.
Software model	This field value is automatically set to the selected software model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Allocated Quantity	Number of users from the assignment group allocated to the software entitlement. The number is automatically populated when the allocation group record is saved.
Entitlement condition	Entitlement condition to allocate a user group to the filtered software entitlement records. **1.** Select **Set conditions**. **2.** In the Entitlement condition pop-up window, build a filter by adding conditions. **3.** Select **Set** to save the record or **Cancel** to close the Entitlement condition pop-up window without saving the changes.

Related topics

Create group allocations

Allocating licenses to a user group

Software model metric attributes

Software model metric attributes and related list field descriptions.

Metric attributes

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
Maximum installs per right		True	The number of installs each right can license.	Per Named Device	Common
Minimum cores per processor	8	False	The number of core rights that must be applied to a physical processor or set of vCores. `Licensable cores = Processors * Max (Minimum cores per processor, Cores)`	Per Core (with CAL)	Microsoft
Minimum cores per VM	8	False	The number of core rights that must be applied to a virtual machine (VM).	Per Core (with CAL)	Microsoft

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
Maximum active OSEs per server	2	False	The maximum number of Operating System Environments (OSEs) allowed to run software on a physical server. `Licenses required = (Licensable OSEs/ Maximum active OSEs per server) * Licensable cores`	Per Core (with CAL)	Microsoft
Minimum cores per server	16	False	The number of core rights that must be applied to a physical server. `Licensable cores = Max (Processors * Max (Minimum cores per processor, Cores), Minimum cores per server)`	Per Core (with CAL)	Microsoft
Maximum installs per OSE	1	False	The maximum number of installs allowed within one of a server's OSEs. `Licenses required = (Licensable installs per OSE/ Maximum installs`	Per Core (with CAL)	Microsoft

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			`per OSE) * Licensable cores`		
Minimum cores per processor	1	False	The number of core rights that must be applied to a physical processor.	Per Core	Common
Maximum size of instance on cloud	8	False	Oracle Database Standard Edition, Oracle Database Standard Edition One and Oracle Database Standard Edition 2 have maximum limits on the size of the instances to which they're deployed on Oracle Authorized Cloud Environments such as Microsoft Azure and AWS. Oracle Database Enterprise Edition doesn't have any maximum limits on the size of the instances to which it's deployed to on Oracle Authorized Cloud Environments such as Microsoft Azure and AWS.	Per Processor	Oracle
Maximum number of sockets per server	2	False	Oracle Database Standard Edition, Oracle	Per Processor	Oracle

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			Database Standard Edition One and Oracle Database Standard Edition 2 may only be licensed on servers that have a value less than the maximum number of sockets.		
Maximum installs per right		True	The maximum number of installs each right can license.	Per Named User	VMware
Maximum installs per right		True	The maximum number of installs each right can license.	Per Named User	IBM
Maximum installs per right		True	The maximum number of installs each right can license.	Per Named User	Common
Maximum VMs per right	2	False	For RHEL Server, this is the number of VMs running on a physical host that each subscription can license. A single VM running on a host needs one subscription. For RHEL for Virtual Datacenters, this is the number of VMs that can be licensed with one subscription for	Per Socket-pair	Red Hat

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			each socket-pair on the physical host.		
Maximum sockets per right	2	False	The number of sockets on the physical host each subscription can license. A single socket host needs one subscription.	Per Socket-pair	Red Hat
Maximum processors per right	2	False	The maximum number of physical processors each right can license. `Licenses required = Processors/ Maximum processors per right`	Per Processor	Microsoft
Maximum active OSEs per server	2	False	The maximum number of OSEs allowed to run software on a physical server. `Licenses required = Licensable OSEs/ Maximum active OSEs per server`	Per Processor	Microsoft
Maximum installs per OSE	1	False	The maximum number of installs allowed within one of the server's OSEs. `Licenses required = Licensable installs`	Per Processor	Microsoft

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			`per OSE/ Maximum installs per OSE`		
Maximum installs per OSE	1	False	The maximum number of installs allowed within one of the server's OSEs. `Licenses required = Licensable installs per OSE`	Server (Per Instance)	Microsoft
Maximum installs per right	1	False	The maximum number of installs each right can license.	Per Application Instance	VMware
Maximum installs per right		True	The maximum number of installs each right can license.	Per OSI	VMware
Minimum NUPs	5	False	If licensed by Named User Plus (NUP), then both Oracle Database Standard Edition and Oracle Database Standard Edition One require a minimum of five NUP licenses each.	Named User Plus	Oracle
Minimum NUPs for WebLogic on-premise deployments	10	False	The minimum number of users required to be licensed for programs accessing a processor. This attribute is used for reconciling	Named User Plus	Oracle

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			entitlements with an Oracle NUP license metric for Oracle WebLogic Standard and WebLogic Enterprise deployed on-premise. For WebLogic Standard, the attribute counts occupied sockets and for WebLogic Enterprise, the attribute counts processor cores.		
Maximum number of sockets per server	2	False	Oracle Database Standard Edition, Oracle Database Standard Edition One and Oracle Database Standard Edition 2 may only be licensed on servers that have a value less than the maximum number of sockets.	Named User Plus	Oracle
Minimum users per processor	25	False	The minimum number of users allowed to access a physical processor. This metric attribute is applicable for both on-premise and Oracle Authorized Cloud Environments	Named User Plus	Oracle

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			such as Microsoft Azure and AWS.		
Minimum NUPs on cloud	10	False	If licensed by NUP, Oracle Database Standard Edition 2 requires a minimum of 10 NUP licenses per 8 vCPUs on Oracle Authorized Cloud Environments such as Microsoft Azure and AWS.	Named User Plus	Oracle
Maximum size of instance on cloud	8	False	Oracle Database Standard Edition, Oracle Database Standard Edition One and Oracle Database Standard Edition 2 have maximum limits on the size of the instances to which they're deployed on Oracle Authorized Cloud Environments such as Microsoft Azure and AWS. Oracle Database Enterprise Edition doesn't have any maximum limits on the size of the instances to which it's deployed to on Oracle	Named User Plus	Oracle

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			Authorized Cloud Environments such as Microsoft Azure and AWS.		
Minimum NUPs for WebLogic cloud deployments	10	False	The minimum number of users required to be licensed for programs accessing a vCPU. This attribute is used for reconciling entitlements with an Oracle NUP license metric for Oracle WebLogic Standard and WebLogic Enterprise on Oracle Authorized Cloud Environments such as AWS or Azure Cloud. For the Standard edition, a minimum of 10 NUP licenses are required per 8 vCPUs on either AWS or Azure Cloud. For the Enterprise edition, if hyper-threading is enabled then 10 NUP licenses are required per 2 vCPUs, and if hyper-threading is not enabled then 10 NUP licenses are required per vCPU.	Named User Plus	Oracle

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
Minimum NUPs per server	10	False	If licensed by NUP, Oracle Database Standard Edition 2 requires a minimum of 10 NUP licenses per server.	Named User Plus	Oracle
Maximum cores per processor		True	One license is required per CPU up to the physical core per CPU maximum. If a CPU has more physical cores than the maximum, additional CPU licenses are required. `Licenses required = Processors * (Cores/ Maximum cores per processor)`	Per Processor	IBM
Maximum cores per processor		True	One license is required per CPU up to the physical core per CPU maximum. If a CPU has more physical cores than the maximum, additional CPU licenses are required. `Licenses required = Processors * (Cores/ Maximum`	Per Processor	Citrix

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			`cores per processor)`		
Maximum cores per processor	32	False	Effective April 2, 2020, VMware requires one license for up to 32 physical cores. If a CPU has more than 32 cores, additional CPU licenses are required. `Licenses required = Processors * (Cores/ Maximum cores per processor)`	Per Processor	VMware
Maximum cores per processor		True	One license is required per CPU up to the physical core per CPU maximum. If a CPU has more physical cores than the maximum, additional CPU licenses are required. `Licenses required = Processors * (Cores/ Maximum cores per processor)`	Per Processor	Common
Maximum installs per right		True	The maximum number of installs each right can license.	Per Device	Adobe

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
Maximum installs per right		True	The maximum number of installs each right can license.	Per Device	IBM
Maximum installs per right		True	The maximum number of installs each right can license.	Per Device	Microsoft
Maximum installs per right		True	The maximum number of installs each right can license.	Per Device	Citrix
Maximum installs per right		True	The maximum number of installs each right can license.	Per Device	Common
Maximum installs per right		True	The maximum number of installs each right can license.	Per Device	VMware
Minimum cores per VM	4	False	The number of core rights that must be applied to a virtual machine.	Per Core	Microsoft
Minimum cores per processor	4	False	The number of core rights that must be applied to a physical processor or set of vCores.	Per Core	Microsoft
Maximum installs per right		True	The maximum number of installs each right can license.	Per User	Adobe
Maximum installs per right		True	The maximum number of installs each right can license.	Per User	Microsoft
Maximum installs per right		True	The maximum number of installs each	Per User	IBM

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Attribute	Attribute value	Attribute value is unlimited	Description	License metric	Metric group
			right can license.		
Maximum installs per right		True	The maximum number of installs each right can license.	Per User	Citrix
Maximum installs per right		True	The maximum number of installs each right can license.	Per User	Common

Subscription downgrade configuration condition

Determine various downgrade configuration conditions for SaaS applications and view the downgrade order based on the conditions.

Software downgrade configuration condition

Field	Description
Downgrade configuration	Name of the downgrade configuration that includes the source and destination subscription.
Condition	Defined downgrade configuration condition for the SaaS application.
Condition value	Value assigned to the downgrade configuration condition.
Products	Products for which the downgrade configuration condition is defined.
Active	Shows whether the downgrade configuration condition is active.

Software entitlement fields

Software Entitlement form and related list field descriptions.

Software Entitlement form

Note: From the Brazil release, the Database option column no longer exists in the Software Entitlement [alm_license] and the Override License Cost [samp_override_license_cost] tables. If you customized your form view prior to the Brazil release to include the database option column, then you get to see the Database option in the software entitlement form.

The list view for software entitlements shows the total number of software entitlement records for your organization based on the value specified in the **SAM Workspace License operations list count limit** system property (*sn_sam_workspace.sam_license_operations_list_count*). The default value for the record count is set to **5000000**. However, the SAM administrator can set the value for the count in the system property as required. If there are less than five million records, then

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

the exact count is shown. If there are more than five million records, then the count is shown as 5000000+. For more information on this system property, see Software Asset Management properties.

Field	Description
Display name	Automatically generated name based on the software model display name.
Asset tag	Serial number and the bar code used for tracking the asset.
Publisher part number	Publisher part number (PPN) from the Software Product Definitions lookup list of predefined software that may have already been purchased. You can edit this field in existing entitlements. When you select a publisher part number, you may encounter a message: `Many underlying software models are being created. These might be part of suite components, downgrade rights or next version. Please validate on completion.` The message appears only if there are greater than or equal to 50 suite components for the software model and if any of the following conditions are met: • A software model doesn't exist for any suite component • A software model doesn't exist for any downgrade right • A software model doesn't exist for the next version **Note:** If a software model exists for the publisher part number, the **Software model** field is automatically populated. Otherwise, the software model is automatically created for you directly from this form. If there are multiple software models created with the same discovery map conditions, the software model must be selected manually.
Software model	The software model to match the entitlement. **Note:** A warning message is shown if the publisher part number isn't associated with the publisher and product for the software model. You can either change the software model, or save the entitlement as is. You can edit this field in existing entitlements.
Agreement type	Based on the agreement type that you select, downgrade rights are automatically generated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If you select any of the following agreement types, the status of the entitlement is Compliant even if you have unlicensed installations: • **Enterprise Agreement** • **Enterprise Enrollment** • **Enterprise Subscription Agreement** • **Enterprise Subscription Enrollment** • **Enterprise License Agreement (ELA)** • **Enterprise Term License Agreement (ETLA)** • **Server and Cloud Enrollment (SCE)** • **Unlimited License Agreement (ULA)**
License type	The type determines whether the rights grant full access to the software or if they're being upgraded from a previous version of the software. The following are the various license types: • Perpetual • Perpetual + Software Assurance • Software Assurance • Subscription • Step-up • Subscription Step-up • Add-on • From SA **Note:** After you upgrade to the Brazil release and a content update is performed, if the content update changes the license type of a specific PPN from Step-up to Subscription Step-up, all entitlements associated with that PPN will be updated to Subscription Step-up entitlements. The default value for SaaS entitlements is **Subscription**. For more information about the license types and their impact on software reconciliation, see Impact of different license types on software reconciliation.
Metric group	This field is automatically populated based on the **Software Model** field. Each metric group has a set of license metrics that are specific to the software publisher. **Note:** If this field is set to **Consumption** or **Subscription**, the **License type** field is automatically set to **Subscription**.
License metric	License metric for the license group that the software license is counted against when reconciliation is run. The options for license metric change based on the **Metric group** field. For more information, see Software license metrics.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: • The default value for SaaS entitlements is **User Subscription**. • For SaaS Consumption, the spend in the License Metric Results (samp_license_metric_result) gets calculated for the current subscription period only, which isn't the total cost of the entitlement. For example, if the Purchased rights are 100, the Unit cost is $1, the License type is Subscription, the Subscription period is Monthly, and the Start date and End date are set to a period of 2 months, then the Total cost would be $200. But since the consumption is reconciled for the current subscription period, the spend in the License Metric Results shows as $100.
Unlimited license	Indicates that the entitlement being created is an unlimited license.
Subscription period	Billing frequency for your software subscription. The options are **Monthly**, **Quarterly**, **Annually**, and **Entire Subscription Period**. The **Entire Subscription period** option indicates that you're required to pay only after throughout the entire duration of your subscription. If you select **Monthly**, **Quarterly**, or **Annually**, you must specify the time period during which the subscription is valid in the **Start date** and **End date** fields. If you select **Entire Subscription Period**, only the **Start date** field is required. This field appears only if you select **Subscription**, **Subscription Step-up**, **Add-on**, or **From SA** from the License type list.
Start date	Start date of your subscription, maintenance entitlement, SA service, add-on capability, or From SA service. This field appears only if you select **Subscription**, **Perpetual + Maintenance**, **Maintenance**, **Perpetual + Software Assurance**,**Software Assurance**, **Step-up**, **Subscription Step-up**, **Add-on**, or **From SA** from the License type list.
End date	End date of your subscription, maintenance entitlement, SA service, add-on capability, or From SA service. After the end date is reached, the maintenance flag is cleared and the state is retired if **Software Assurance** was specified as the **License type**. This field appears only if you select **Subscription**, **Perpetual + Maintenance**, **Maintenance**, **Perpetual + Software Assurance**,**Software Assurance**, **Step-up**, **Subscription Step-up**, **Add-on**, or **From SA** from the License type list.
Rights per license pack	Number of rights associated with each pack that is purchased for Microsoft products that use Per Core or Per Core with CAL licenses. For Microsoft products, the licenses are available in packs. For example, SQL server core licenses are available in packs of two.
Number of packs	Number of packs for Microsoft products that use Per Core or Per Core with CAL licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	You can edit this field in an existing entitlement. If you change the value in this field, the **Purchased rights** field is automatically updated.
Purchased rights	Number of rights that you're purchasing. You can edit this field in an existing entitlement. If you change the value in the this field, the expense line item is automatically updated. **Note:** If you have specified a Microsoft Per Core or Microsoft Per Core with CAL license type, this field is automatically populated. This value is based on the value entered in the **Rights per license pack** field multiplied by the value in the **Number of packs** field. From the Brazil release, revenue-based licensing support is enabled for this field for SAP Engine products. This support enables using higher value revenue-based SAP Engine products.
Active rights	Number of rights to be granted for this entitlement. **Note:** If an enterprise contract is attached to the license, the **Active rights** field isn't shown.
Allocations available	Number of user or device allocations that haven't been created for an entitlement. Allocations available = (number of active rights) - (sum of all allocation quantities).
Unit cost	Unit cost of the software. **Note:** Required for total cost and savings calculations on the Software Asset Management dashboard. From the Brazil release, revenue-based licensing support is enabled for this field for SAP Engine products. This support enables using higher value revenue-based SAP Engine products.
Total cost	Total cost of the entitlement calculated from the unit cost.
Total units	Total number of software units that you've purchased for this entitlement. This field appears only if the **Metric group** field is set to **Consumption**.
Unrestricted consumption	If selected, license consumption isn't limited to the entities listed in the consumption rule. Any entity can consume rights, but the entities in the consumption rules have rights reserved for them. The reserved rights come from the license pool column. **Note:** This check box can only be selected if all existing consumption rules have a license pool. Any new consumption rule must define a pool as well.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

General tab

Field	Description
Serial number	Unique number assigned for identification of the asset.
Owned by	User or department with financial ownership of the asset. The asset owner can be different than the manager.
State	Current state of the asset. Values include **On order**, **In stock**, **In transit**, **In use**, **Consumed**, **In maintenance**, **Retired**, **Missing**, and **Build**. **Note:** When you start creating an entitlement, its initial status is **Build**. After you publish the entitlement, the status changes to **In use**. If the state is **Retired**, the **Active rights** field is set to **0**. For entitlements with a **Subscription** license duration, the **State** field is automatically updated based on the **Start date** and **End date** fields.
Substate	More details about the software license stage. The available substate settings depend on the state selected in the **State** field. For example, if you select the Retired state, the substate options available are Disposed, Sold, Donate, and Vendor credit.
Active maintenance	Indicates if Subscription, SA, or maintenance is activated on the entitlement. If the entitlement has an active SA, subscription, or maintenance associated with it, the check box is automatically selected. If an entitlement initially had subscription, SA or maintenance activated on it and subscription, SA or maintenance is no longer active, the check box is automatically cleared. If you upgrade from a previous release to the Brazil release, this check box is automatically selected for your existing entitlements that have an active SA, subscription, or maintenance associated with them.
Company	Company that this asset belongs to.
Location	Where the license is used. For example, you can specify a site, country, or region.
Department	Department of the person **Assigned to** this software license.

Financial tab

Field	Description
Vendor	Company that the asset was purchased from.
Invoice number	Invoice that the asset was billed under.
Request line	Request line linked to the asset.
Purchased	The date the entitlement was purchased. This date is considered when reconciliation runs as Microsoft has updated its licensing rules for dedicated hosts on AWS and Microsoft Azure.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: The purchased date is also visible when importing entitlements.
Opened	Date that the request was opened.
GL account	General ledger account number associated with the asset.
Cost center	Cost center financially responsible for the asset.

Contracts tab

When importing software entitlements, use the **Contract number** column on the downloadable template to link the contracts to the entitlements. Since the **Contract number** is a reference field, the system first searches for matches to existing contracts, so enter existing contract numbers. If no matching contract number is found, entitlement import errors are generated.

You should be able to create the contract from the error, enabling for the creation of the entitlement and the appearance of the contract on the entitlement form in the Contracts related list. You can also skip the contract creation process and still create the entitlement, but without a contract.

Field	Description
Lease contract	Contract that applies to the asset.
Warranty expiration	Expiration date of the warranty.
Support group	Group that supports incidents related to the asset.
Supported by	Individual that supports incidents related to the asset.

User Allocations tab

Note: This tab appears only if you're using a user-based license metric, such as Per User or User CAL.

Field	Description
Assigned condition	Condition to account for only user allocations during reconciliation. Only user allocations that meet the specified conditions are included in the reconciliation.
Assigned to	User that the associated rights are allocated to. **Note:** If you're using a client access record to track and manage the users that are accessing your server software, this field displays the name of each user that you assigned the associated client access licenses (CALs) to. See Add a software client access record in Software Asset Management classic for detailed instructions on how to assign CALs to users in the Software Asset Management classic application. See Create a software client access record in workspace for detailed instructions on how to assign CALs to users in the Software Asset Workspace.
Quantity	Number of rights that are allocated to the user.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
License key	Unique license key that is allocated to the user.
Group	Indicates the assignment group name when a user allocation is created from a group user allocation to the software entitlement. When a user allocation isn't created from a group user allocation to the software entitlement, this column value is empty.

Device Allocations tab

Note: This tab appears only if you're using a device-based license metric, such as Per Device or Device CAL.

Field	Description
Allocated condition	Condition to account for only device allocations during reconciliation. Only device allocations that meet the specified conditions are included in reconciliation.
Assigned to	Device that the associated rights are allocated to. **Note:** If you're using a client access record to track and manage the devices that are accessing your server software, this field displays the name of each device that you assigned the associated client access licenses (CALs) to. See Add a software client access record in Software Asset Management classic for detailed instructions on how to assign CALs to devices in the Software Asset Management classic application. See Create a software client access record in workspace for detailed instructions on how to assign CALs to devices in the Software Asset Workspace.
Quantity	Number of rights that are allocated to the device.
License key	Unique license key that is allocated to the device.

Related Entitlements tab

Note: This tab appears only if your software entitlement is linked to a related entitlement.

Field	Description
Related Entitlement	Related entitlement that you want to link to your software entitlement.
License type	License type that is associated with the related entitlement.
Active rights	Number of rights that you want to grant to the related entitlement.
Software Entitlement	Software entitlement that you're linking the related entitlement to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Note: This field appears only in the Software Asset Workspace. This field doesn't appear in the Software Asset Management classic application.	

Upgraded Entitlements tab

Field	Description
From Entitlement	The entitlement from which rights are upgrading. Multiple upgrade entitlements are supported. You can upgrade previously owned rights for a particular version of software to a newer version (for example, Microsoft Office Professional Plus 2013 to Microsoft Office Professional Plus 2016). **Note:** This field is available when **Upgrade** is selected from the **License type** field. The rights from entitlements that you're upgrading from get deactivated when you upgrade because they're moved to the new entitlement.
Number of rights	Number of rights to upgrade.

Activities tab

Field	Description
Work notes	Work notes for the asset.

Downgrade Rights related tab

Field	Description
Software entitlement	Software entitlement with which the downgrade is associated.
Software model	Software model corresponding to the downgrade right.
Active	Indicates if the downgrade rights on the software entitlement are active or not. If needed, you can deactivate the downgrade rights. Only the active downgrade rights appear in the list. To see all the downgrade rights, remove the Active condition from the filter. If you deactivate a downgrade right on a software model, the change is propagated to the related software entitlement downgrade rights; irrespective of the source of the downgrade right. To deactivate a downgrade right, double-click the field to display the toggle button. Select false and select the Save icon ( ).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• false: Deactivates the downgrade right on the software model and on the related software entitlements. • true: Deactivates the downgrade right on the software model and on the related software entitlements.
Order	Order of the downgrade. If necessary, you can edit this field.
Start date	Start date of the downgrade.
End date	End date of the downgrade.

Entitlement Consumption Rules related tab

Note: This tab appears for all publishers except Workday. Additionally, the tab appears for all license metrics except the following:

- Resource Value Unit (RVU)
- Resource Value Unit (RVU) Full Capacity
- Resource Value Unit (RVU) Sub-capacity
- Authorized User Value Unit
- Employee User Value Unit
- External User Value Unit
- Employee

Field	Description
Software entitlement	The software entitlement that the consumption is linked to.
Consumption rule	The consumption rule linked to the entitlement.
License pool	License pool associated with the consumption rule. For details on license pools, see Reconciliation of licenses across global entities.

License Key related tab

Field	Description
Is allocated	Option that indicates that the license key has been allocated.
License key	License key value. Must be unique for an entitlement.
Software entitlement	Software entitlement associated with the license key.

License Metric Tier related tab

The **License Metric Tier** tab lists the tier ranges and factors applied when calculating the number of licenses required for a tier-based license metric.

Note: The tab contains data only when the entitlement uses a tier-based license metric. For any other license metric, the tab remains empty.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License Metric Tier tab fields

Field	Description
License metric config	License metric configuration that the tier belongs to. Each tier-based license metric has a set of tiers that define how the consumed quantity is measured.
Tier level	Position of the tier in the sequence of ranges, starting from 1. The tiers are applied in order from the lowest level to the highest.
Range from	Lower bound of the consumed quantity that the tier applies to.
Range to	Upper bound of the consumed quantity that the tier applies to.
Tier factor	Value that is applied to the units within the tier to determine the number of licenses required for that tier.

Software model results license metric results fields

Software model results License Metric Results form and related list field descriptions. You can access this form through the License Metric Results related list in your software model results.

License Metric Results form

Two license metric results are generated if a software model has two entitlements, one with a perpetual SA license type and the other with a subscription license type. One license metric result where active maintenance is true and the other where the active maintenance is false. In such a scenario, two license position reports are generated, one with active maintenance true and the other one with active maintenance false.

Field	Description
License metric	Name of the license metric that the software license is counted against when reconciliation runs.
Software model result	Software model result associated with the license metric results.
Group	Group on which reconciliation was run.
Subgroup	Subgroup on which reconcliation was run.
Rights owned	Sum of all active rights from entitlements that share a license metric.
Rights used	Sum of rights used during reconciliation (allocated + not allocated and installed).
Rights available	Sum of rights not used during reconciliation (rights owned — rights used).
Over-licensed amount	Estimated cost of unused rights.
Right Allocations	
Allocated in use	Rights that are allocated and are used to license installations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Not allocated in use	Number of rights that are used to license installations, but not allocated. When this value is greater than 0, two remediation options (Create Allocations and Remove Unallocated Installs) are automatically created for each unique license metric in the software model that meets this requirement, except User CAL and Device CAL.
Allocated not in use	Rights that are allocated but are not being used to license any installations. **Note:** **Allocated not in use** reflects rights that are wasted because the user or device for which these rights have been allocated do not have the software installed. When this value is greater than 0, a Remove Allocations remediation option is automatically created for each unique license metric in the software model that meets this requirement.
Not allocated	Number of rights that have not been allocated (rights owned — allocated regardless of whether installed or not).
Allocations needed	Number of allocations needed for compliance. Only used for Per Named User and Per Named Device license metrics.

Rights Used By related list

Field	Description
Used by	User or device that is using the rights. **Note:** If your rights are associated with client access records, the **Used by** field displays the name of each client access record that is using those rights. Select a client access record name to view the corresponding breakdown of users or devices that are using the associated rights. See Add a software client access record in Software Asset Management classic for more information on client access records in the Software Asset Management classic application. See Create a software client access record in workspace for more information on client access records in the Software Asset Workspace.
Rights used	Sum of rights used during reconciliation (allocated + not allocated and installed).
Allocated in use	Rights that are allocated and are used to license installations.
Not allocated in use	Number of rights that are used to license installations, but not allocated. When this value is greater than 0, two remediation options (Create Allocations and Remove Unallocated Installs) are automatically created for each unique license metric in the software model that meets this requirement, except User CAL and Device CAL.
Allocated not in use	Rights that are allocated but are not being used to license any installations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: **Allocated not in use** reflects rights that are wasted because the user or device for which these rights have been allocated do not have the software installed. When this value is greater than 0, a Remove Allocations remediation option is automatically created for each unique license metric in the software model that meets this requirement.
Nontransferable rights	Remaining rights from a core pack that cannot be used to license any additional devices. Nontransferable rights are available only for Microsoft Per Core and Microsoft Per Core with (CAL).
Allocations needed	Number of allocations needed for compliance. Only used for Per Named User and Per Named Device license metrics.

Rights Needed By related list

Field	Description
Rights needed by	Unlicensed user or device that requires rights. **Note:** If rights are needed to cover unlicensed users or devices in an associated client access record, the **Rights needed** field displays the name of the client access record that requires those additional rights. Select the client access record name to view the corresponding breakdown of unlicensed users or devices that require rights. See Add a software client access record in Software Asset Management classic for more information on client access records in the Software Asset Management classic application. See Create a software client access record in workspace for more information on client access records in the Software Asset Workspace.
Rights needed	Number of rights that are required to cover the unlicensed user or device.

Licensed Installs related list

Note: This related list is not available for SAP license metrics.

Field	Description
Display name	Name of the software installation.
Publisher	Publisher of the software.
Version	Version of the software.
Discovery model	Software discovery model for the installed software.
Installed on	Hardware on which the software is installed.
Assigned to	User or device to which the software is assigned.

Downgrades/Upgrades related list

Note: This related list is not available for SAP license metrics.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Software model	Software model that is available for upgrade or downgrade.
Rights used	Sum of rights used during reconciliation (allocated + not allocated and installed).
Allocated in use	Rights that are allocated and are used to license installations.
Not allocated in use	Number of rights that are used to license installations, but not allocated. When this value is greater than 0, two remediation options (Create Allocations and Remove Unallocated Installs) are automatically created for each unique license metric in the software model that meets this requirement, except User CAL and Device CAL.
Allocated not in use	Rights that are allocated but are not being used to license any installations. **Note:** **Allocated not in use** reflects rights that are wasted because the user or device for which these rights have been allocated do not have the software installed. When this value is greater than 0, a Remove Allocations remediation option is automatically created for each unique license metric in the software model that meets this requirement.
Allocations needed	Number of allocations needed for compliance. Only used for Per Named User and Per Named Device license metrics.

SAP System Users related list

Note: This related list is available only for SAP named user license metrics.

Field	Description
Display name	Identifier containing the SAP user ID and SAP client.
User	Full name of the SAP user.
SAP user id	Unique identifier for the SAP user.
Email	Email address of the SAP user.
First name	First name of the SAP user.
Last name	Last name of the SAP user.
User type	Type of SAP user.
License type	Named user type value assigned to the SAP user.
Named user type	Normalized named user type of the SAP user.
Optimized named user type	Optimized named user type of the SAP user.
SAP client	Organizational subunit to which the SAP user belongs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensed Subscriptions related list

Field	Description
Display name	Identifier containing the publisher and product of the software subscription.
User	Name of the subscription user.
User principal name	Email address of the subscription user.
Software model	Software model for the subscription software.
Subscription profile	Direct integration profile for the subscription software.
Subscription type	Type of subscription.

Software storage usage fields

Determine the usage information for SaaS applications for generating downgrade subscriptions.

Software storage usage

Field	Description
User principal name	User name or email address of the user.
Subscription profile	Name of the user subscription profile.
Storage allocated (bytes)	Storage allocated to the user in bytes.
Storage used (bytes)	Storage used by the user in bytes.
Product	Name of the product for the usage record.
Is deleted	Indicates whether the user's storage account, such as Microsoft OneDrive or mailbox, has been deleted.

Software subscription fields

Software subscription form fields, their descriptions, and the SaaS integrations for which these fields are populated.

Some of the fields in the Software subscription table get populated for specific SaaS integrations while some get populated for all SaaS integrations.

Software subscription form fields

Field	Description	Is pulled from the portal?	SaaS integration
Display name	Name of the subscription downloaded from the SaaS portal.	Yes	All SaaS integrations
Publisher	The publisher for the subscription.	Yes	All SaaS integrations
Product	The software product for the subscription.	Yes	All SaaS integrations

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software subscription form fields (continued)

Field	Description	Is pulled from the portal?	SaaS integration
Version	Version of the software product.	Yes	All SaaS integrations
Edition	Edition of the software product.	Yes	All SaaS integrations
Software model	A standardized version of a software product for the subscription. The software model is automatically created for SaaS integrations.	No (Automatically created by ServiceNow)	All SaaS integrations
User	The ServiceNow user record in the User [sys_user] table representing a real person within an organization. In general, the User table is populated through the Active directory integration in the organization.		All SaaS integrations
User principal name	A unique identifier for a user in the SaaS portal. This is typically the email address of the user in the SaaS portal.	Yes	All SaaS integrations
Last activity	The date when the subscription record was last active. For Microsoft 365 products, this field is populated from the Software Usages [samp_sw_usage] table and Microsoft 365 Apps Usage Reports [samp_m365-apps-usage-report] table. This field determines usage-based optimization recommendation.	Yes	All SaaS integrations except CrowdStrike and Docusign
Inactive days	Number of days for which a user's subscription has been inactive. This field is visible on the Software Subscriptions form when the **Last**	No (Automatically determined)	All SaaS integrations except CrowdStrike

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software subscription form fields (continued)

Field	Description	Is pulled from the portal?	SaaS integration
	activity field isn't empty. Inactive days are calculated using the value in the **Last activity** field.		
Subscription profile	Display name of the integration profile.	No (Automatically created by ServiceNow)	All SaaS integrations
Licensable software model	Name of the software model relevant for licensing purposes.	No (Automatically determined)	All SaaS integrations
Subscription identifier	A unique technical identifier provided by the SaaS provider, such as a service plan ID, that indicates the specific product or plan a user is subscribed to. This identifier allows ServiceNow to correctly map the subscription to the corresponding software model. For example, identifiers like VISIOCLIENT and ENTERPRISEPACK map to specific products such as Microsoft Visio Plan 2 and Office 365 E3, respectively.	Yes	All SaaS integrations
Inferred suite	The inferred suite model that this software subscription belongs to.	No (Automatically determined)	Microsoft 365 integration
Discovered user	The record in the Discovered User [samp_discovered_user] table that represents a user identity discovered from an external system.	No (Automatically determined)	All SaaS integrations
Active	Indicates if the subscription record is active.	No (Automatically determined)	All SaaS integrations
Is reconciled	Indicates whether the SaaS subscription has been reconciled. This field is populated after reconciliation is run.	No (Automatically determined)	All SaaS integrations

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software subscription form fields (continued)

Field	Description	Is pulled from the portal?	SaaS integration
License metric result	License metric result of the software product that is populated after reconciliation. For more information on license metric results, see Software reconciliation results.	No (Automatically determined)	All SaaS integrations
Product result	Product result of the software product that is populated after reconciliation. For more information on product results, see Software reconciliation results.	No (Automatically determined)	All SaaS integrations
Software model result	Software model result of the software product that is populated after reconciliation. For more information on software model results, see Software reconciliation results.	No (Automatically determined)	All SaaS integrations
Unlicensed subscription	Indicates whether the subscription remains unlicensed after reconciliation due to insufficient available licenses. This field is updated with a true or false value to reflect the licensing status.	No (Automatically determined)	All SaaS integrations

Entitlement import error fields

Entitlement Import Error form and related list field descriptions.

Entitlement Import Error form

Field	Description
Error status	Status of the entitlement. An error record can have either of the two statuses: • Manually fixed: when all the errors in the error record are corrected and the entitlement is successfully created. • Needs review:the error record is created and you need to review and correct the errors.
Reason	Reason the imported entitlement couldn't be added to the Entitlement list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Asset tag	Serial number and the bar code used for tracking the asset.
Publisher part number	Publisher part number from the Software Product Definitions lookup list of predefined software that may have already been purchased. When you select a publisher part number, you may encounter a message: `Many underlying software models are being created. These might be part of suite components, downgrade rights or next version. Please validate on completion.` The message appears only if there are greater than or equal to 50 suite components for the software model and if any of the following conditions are met: • A software model does not exist for any suite component • A software model does not exist for any downgrade right • A software model does not exist for the next version **Note:** If a software model exists for the publisher part number, the **Software model** field is automatically populated. Otherwise, the software model is automatically created for you directly from this form. If there are multiple software models created with the same discovery map conditions, the software model must be selected manually.
Software model	The software model to match the entitlement. **Note:** A warning message is shown if the publisher part number is not associated with the publisher and product for the software model. You can either change the software model, or save the entitlement as is.
License type	License type. Whether the rights grant full access to the software or if they are being upgraded from a previous version of the software. When the type is **Upgrade**, the Upgraded Entitlements related list is shown. The upgrade license type is used to specify the entitlements you are upgrading. This field becomes read-only after the form has been submitted. **Note:** For SaaS entitlements, keep the default value **(Full)**.
Metric group	This field is automatically populated based on the **Software Model** field. Each metric group has a set of license metrics that are specific to the software publisher.
License metric	License metric for the license group that the software license is counted against when reconciliation is run. The options for license metric change based on the **Metric group** field. The default value for SaaS entitlements is **User Subscription**. For more information, see Software license metrics. **Note:** Use the Envelopes license metric only for Docusign entitlements.
Rights per license pack	Rights associated with each pack that is purchased for Microsoft Per Core or Microsoft Per Core with CAL licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Number of packs	Number of packs for Microsoft Per Core or Microsoft Per Core with CAL licenses.
Purchased right	Number of rights that you are purchasing. **Note:** If you've specified a Microsoft Per Core or Microsoft Per Core with CAL license type, this field is automatically populated. This value is based on the values entered in the **Rights per license pack** field multiplied by the value in the **Number of packs** field.
Agreement type	Based on the agreement type that you select, downgrade rights are automatically generated. **Note:** If the agreement type is **Enterprise License Agreement** or **Unlimited Level Agreement**, the **Status** is Compliant even if there are unlicensed installations. • **Generic**: Downgrade rights are not automatically populated. If you change the agreement type on an existing software entitlement from **Generic** to any other type (for example **CLP**), the downgrade rights are automatically populated. • Any agreement type other than Generic: Downgrade rights are automatically populated. If you change the agreement type on an existing software entitlement from an agreement type other than **Generic** (for example, **ELTA**) to **Generic**, the downgrade rights that were already populated are not deleted or deactivated.
Purchased rights	Number of rights that you are purchasing.
Oracle options	Oracle options related to the entitlement.
Contract number	Contract number for the entitlement.

Reference software related list

Field	Description
Publisher	Name of the software publisher.
Product	Name of the product.
Version	Version of the software product.
Edition	Edition of the software product.
Language	Language of the software product to use when searching for the normalized discovery model, which is populated once it has been normalized or added manually.
Platform	Platform of the software product to use when searching for the normalized discovery model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

General related list

Field	Description
Owned by	User or department with financial ownership of the asset. The asset owner can be different than the manager.
PO number	Purchase order number.
Company	Company that this asset belongs to.
Location	Where the license is used. For example, a specific site, country, or region.
Department	Department of the person **Assigned to** this software license.

Financial related list

Field	Description
Vendor	Company that the asset was purchased from.
Unit cost	Unit cost of the software. **Note:** Required for total cost and savings calculations on the Software Asset Management dashboard.
GL account	General ledger account number associated with the asset.
Cost center	Cost center financially responsible for the asset.

Entitlement import error actions

Entitlement Import Error form action descriptions.

Entitlement Import Errors actions

Action	Description
Import	Option that saves the Entitlement Import Error record. After you save the record, you remain on the Entitlement Import Error form, so you can easily save the form between actions Upon saving, all values are reevaluated and the form is updated. For example, if both the publisher part number and software model fields are missing, once a known publisher part number is added and the form is saved, the **Software model** field is filled in automatically. **Note:** Because the form is reevaluated after each save, changes made to one entitlement may cause an error for another entitlement, such as a **Duplicate entry**. When all required fields are filled in and the form is saved, an entitlement record is created and the error status is changed to Fixed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action	Description
Create PPN	Part number for custom software. If you are importing entitlements using the Software Asset Management workspace application, on selecting **Create PPN**, you are taken to the Custom Part Numbers list view page. Select **New** to create a new publisher part number. If you are importing entitlements using the Software Asset Management classic application, on selecting **Create PPN**, the Create Discovery Map for Publisher Part Number dialog box appears. Select a product name in the **Product** field and select **Submit** to create a custom discovery map which is automatically associated with the publisher part number.
Create duplicate entitlement	Duplicate entitlement records cause an import error. Select **Create duplicate entitlement** to override the error and create an entitlement for the duplicate record. **Note:** This action only appears if there is an entitlement that already exists and a duplicate entitlement is being created.

Impact of different license types on software reconciliation

Each license type has entitlements and conditions outlined on the entitlement form, and more importantly, these license types have a significant impact on the Software Asset Management (SAM) reconciliation process.

License types and their impact on software reconciliation

License type	Description	Publisher applicability	Impact on licensing or reconciliation in SAM
Perpetual	A one-time purchase license that enables indefinite use of the software without any ongoing or recurring payments.	All	This license grants indefinite use but doesn't include maintenance rights, so benefits such as new version access, version upgrades, Bring your own license (BYOL) benefits, and technical support from the software publisher aren't available. To receive maintenance/SA benefits, you must associate maintenance/SA entitlements with the Perpetual license.
Perpetual + Software Assurance	A perpetual license combined with Software Assurance (SA) from Microsoft offers	Microsoft	Software Asset Management automatically applies the Software Assurance benefits.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License types and their impact on software reconciliation (continued)

License type	Description	Publisher applicability	Impact on licensing or reconciliation in SAM
	a comprehensive Volume Licensing program with these benefits: • New version rights: Upgrade eligible Microsoft product licenses to the latest version at no additional cost. • License mobility: Deploy certain server applications on-premises or in the cloud without additional licenses. • Unlimited virtualization: License the physical host for products such as Windows Server Datacenter Edition, enabling an unlimited number of virtual machines. • Virtual layer licensing: License individual virtual machines, reducing overall licensing costs.		For more information, see Software license maintenance.
Subscription	For subscription-based products like Jira, Microsoft 365, and Adobe Creative Cloud, as well as non-subscription products using subscription licenses, such as Windows and SQL Server.	All (subscription products)	License compliance is primarily driven by user subscriptions pulled from the subscription portal, such as Jira and Microsoft 365. It also applies to non-subscription products like Windows Server and SQL Server, which can receive Software Assurance benefits.
Perpetual + Maintenance	Perpetual + Maintenance is	All	Software Asset Management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License types and their impact on software reconciliation (continued)

License type	Description	Publisher applicability	Impact on licensing or reconciliation in SAM
	similar to Perpetual + Software Assurance, but it includes a maintenance agreement that provides access to software updates, patches, and sometimes support for a specified duration. This license type applies to non-Microsoft publishers such as Oracle and VMware.		automatically applies the Software maintenance benefits. For more information, see Software license maintenance.
Upgrade	A licensing option that enables upgrading from a lower-tier edition to a higher-tier edition, such as Standard to Enterprise, without purchasing a new full license.	All	You can upgrade a lower edition of software, such as SQL Server Standard, to a higher edition, such as SQL Server Enterprise. Use the **Upgraded Entitlements** tab in the Software Entitlement form to link related versions of your software under active maintenance and your upgrades. For more information, see Software entitlement fields.
Software Assurance	Software assurance entitlement that provides Microsoft customers with software assurance benefits. However, it must be linked to a base perpetual license to activate the entitlements.	Microsoft	Software Asset Management doesn't reconcile software assurance entitlements unless they're linked to base perpetual licenses. Confirm that software assurance entitlements are related to base perpetual entitlements for correct reconciliation.
Maintenance	Maintenance entitlement that	All	Software Asset Management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License types and their impact on software reconciliation (continued)

License type	Description	Publisher applicability	Impact on licensing or reconciliation in SAM
	provides benefits to non-Microsoft customers. However, it must be linked to a base perpetual license to activate the entitlements.		doesn't reconcile only maintenance entitlement unless they're linked to base perpetual licenses. Therefore, make sure to relate the maintenance entitlement to base perpetual entitlements for correct reconciliation.
Step-up	A licensing option that enables upgrading from a lower-tier edition of a product to a higher-tier edition, such as Standard to Enterprise,without needing to purchase a full new license.	All	If you're covered under Microsoft Software Assurance, you can upgrade a lower edition of software, such as SQL Server Standard, to a higher edition, like SQL Server Enterprise. Use the **Upgraded Entitlements** tab in the Software Entitlement form to link related versions of your software under active maintenance and your upgrades. For more information, see Software entitlement fields.
Subscription Step-up	Similar to a step-up license, this license type applies to subscription-based licenses, enabling upgrades to higher-tier editions within the subscription term.	All (subscription products)	Same as step-up licenses, but for subscription software only.
Add on	Add-on USL is a user subscription license that lets you try the features of a cloud-based Microsoft 365 product or service while actively using the perpetual on-	Microsoft	The add-on license must be associated with a perpetual Office legacy license with active Software Assurance. Therefore, you must link the two licenses for it to work.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

License types and their impact on software reconciliation (continued)

License type	Description	Publisher applicability	Impact on licensing or reconciliation in SAM
	premise version. If you have a perpetual license with active SA benefits, this license enables you to test the cloud version without fully transitioning to the cloud.		For more information, see Create Microsoft 365 From SA and Add-on entitlements in the Software Asset Workspace.
From SA	A Microsoft 365 From SA USL is a user subscription license that enables you to transition from a perpetual on-premise Microsoft software product to a corresponding cloud-based Microsoft 365 subscription, while maintaining certain SA benefits. This license is available if you have a perpetual license for on-premise Microsoft software products or services with active SA benefits.	Microsoft	The From SA license must be associated with a perpetual Office legacy license with active Software Assurance. Therefore, you must link the two licenses for it to work. For more information, see Create Microsoft 365 From SA and Add-on entitlements in the Software Asset Workspace.

Related topics

Software license maintenance

Software entitlement fields

Publisher optimizations for SAP

Identify cost-saving opportunities for SAP licenses by reviewing usage data across users, engines, digital access, and cloud consumption.

To view publisher optimizations for SAP, navigate to **SAM Workspace** > **Software asset analytics** > **Optimization and savings** and then select **SAP** from the **Publisher** drop-down list.

Important: To view recommended licensing optimizations for SAP, you must activate the Software Asset Management Professional for SAP plugin (com.sn_samp_sap) on your ServiceNow instance.

Report	Source	Description
Inactive users	SAP System Users	SAP system users who last logged in over 90 days ago.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
	[samp_sap_system_user]	
System users without a named user assignment	SAP System Users [samp_sap_system_user]	SAP system users without a named user assignment.
Locked out licensed SAP users	SAP System Users [samp_sap_system_user]	Locked SAP users consuming a license.
Licensed non dialog users	SAP System Users [samp_sap_system_user]	SAP non-dialog users with a named user assignment.
Un-used engines	License Metric Results [samp_license_metric_result]	Number of SAP engines that haven't been used, but have active software entitlements.
Users for role based license optimization	SAP System Users [samp_sap_system_user]	Number of SAP users that can have their role changed to optimize license consumption.
Users for transaction based license optimization	SAP System Users [samp_sap_system_user]	Number of SAP users for which Software Asset Management plugin has detected user transaction-based license optimizations.
HANA database monthly peak usage	SAP License Metric Measurements [samp_sap_license_metric_measurement]	Monthly peak usage of HANA database in gigabytes (GB) over the last 12 months.
Digital access usage by client/ system	SAP Digital Access [samp_sap_digital_access]	Total count of Digital Access licenses consumed, grouped by the SAP client.
Digital access usage by document type	SAP Digital Access [samp_sap_digital_access]	Total count of Digital Access licenses consumed, grouped by the document type created.
SAP S/4HANA cloud usage by use type	Software Subscriptions [samp_sw_subscription]	Number of users by their SAP cloud use type in SAP S/4HANA Public Cloud.
SAP S/4HANA Private Cloud usage by use type	SAP System Users [samp_sap_system_user]	Number of users by their Full Usage Equivalent (FUE) Named User Type for SAP S/4HANA Cloud, Private Edition.

Publisher optimizations for Red Hat

View licensing optimizations for Red Hat by selecting **Red Hat** from the **Publisher** drop-down list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: **To view recommended licensing optimizations for Red Hat, you must activate the Software Asset Management Professional for Software Asset Management Professional for IBM plugin (com.sn_samp_ibm) on your ServiceNow® instance.**

Report	Source	Description
Potential savings by optimizing licenses	Potential Savings by Optimizing Licenses [samp_license_optimization_summary]	Potential cost savings for licenses on your physical hosts and clusters that are based on recommended license optimizations. **Note:** This report is available only for on-premise Red Hat Enterprise Linux (RHEL) licenses. Select the report to view details about the recommended license optimizations and associated cost savings for each host or cluster. License optimizations include the recommended license, recommended rights, and recommended spending.

Publisher optimizations for Microsoft

View licensing optimizations for Microsoft by selecting **Microsoft** from the **Publisher** drop-down list.

Important: **To view the recommended licensing optimizations for Microsoft, you must activate the Software Asset Management Professional for Microsoft plugin (com.snc.samp.microsoft) on your ServiceNow® instance. To view the recommended licensing optimizations for your Microsoft 365 subscriptions, you must also request and install the Software Asset Management - SaaS License Management application from the ServiceNow Store.**

Report	Source	Description
Microsoft 365 subscription details	• Active and inactive subscriptions: Software Subscriptions [samp_sw_subscription]	Number of active, inactive, and unassigned user subscription details for Microsoft 365 products, which

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
Note: This report appears only if you request and install the Software Asset Management - SaaS License Management application.	• Unassigned subscriptions: Purchased Subscription Details [samp_purchased_subscription_details]	are grouped by software models. Select a data point to view more details about the user subscriptions for a software model. • Select the **Active subscriptions** bar to view the active user subscriptions, where the last activity date is equal to or less than 90 days. • Select the **Inactive subscriptions** bar to view the inactive subscriptions, where the last activity date is empty or was before 90 days. • Select the **Unassigned subscriptions** bar to view the number of available rights or user subscriptions that are unassigned.
Microsoft 365 subscription assignment details	Software Subscriptions [samp_sw_subscription]	Number of assigned Microsoft 365 subscriptions. This report displays assigned subscriptions for the last six months. Select a data point to view the details of the assigned subscription such as Publisher, Product, User, User principal name, Software model, and Subscription profile.
Microsoft 365 potential savings by type **Note:** This report appears only if you request and install the Software Asset Management - SaaS License Management application.	Removal Candidate [samp_sw_reclamation_candidate]	Potential monthly savings for your Microsoft 365 licenses that are based on recommended downgrade, overlapping, consolidate, and low usage candidates. This report displays potential savings for the last six months. Select any bar to view more details about the recommended downgrade or dual license candidates for a given month.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
		• Select the **Low Usage** bar to view the list of Microsoft 365 low usage reclamation candidates. Select a candidate to view the details, software installations, subscriptions to reclaim, and subscriptions to assign. • Select the **Downgrade** bar to view the list of candidates that can be downgraded to a previous version of Microsoft 365 and Office 365. Select a candidate to view the details, software installations, subscriptions to reclaim, and subscriptions to assign. • Select the **Overlapping** bar to view the list of Microsoft 365 overlapping reclamation candidates. Select a candidate to view the details, subscriptions to reclaim, and subscriptions to assign. • Select the **Consolidate** bar to view the list of Microsoft 365 consolidate subscriptions reclamation candidates. Select a candidate to view the details, subscriptions to reclaim, and subscriptions to assign.
Microsoft 365 optimization recommendations **Note:** This report appears only if you request and install the Software Asset Management - SaaS License Management application.	Removal Candidate [samp_sw_reclamation_candidate]	Number of licenses per month that can be downgraded or reclaimed based on recommended downgrade, overlapping, consolidate, and low usage candidates. This report displays data for the last six months. • Select the **Low Usage** bar to view the list of Microsoft 365 candidates that can be reclaimed based on low usage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
		• **Downgrade**: Select the Downgrade bar to view the list of Microsoft 365 and Office 365 candidates that can be downgraded. Select a candidate from the list to downgrade the associated license. • **Overlapping**: Select the Overlapping bar to view the list of Microsoft 365 overlapping reclamation candidates. Select a candidate from the list to reclaim the associated license. • **Consolidate**: Select the Consolidate bar to view the list of consolidated Microsoft 365 optimization candidates. Select a candidate from the list to reclaim the associated license.
On-Premises potential savings by optimizing licenses	Potential Savings by Optimizing Licenses [samp_license_optimization_summary]	Potential cost savings for licenses on your physical hosts and clusters based on recommended licensing optimizations. **Note:** This report is available only for the following Microsoft license types: • Per core licenses for Microsoft SQL Server and Microsoft BizTalk Server • Per core (with CAL) licenses for Microsoft Windows Server, Microsoft Core Infrastructure Server, and Microsoft System Center Select the report to view details about the recommended licensing optimizations and associated cost savings for each

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
		host or cluster. Licensing optimizations include the recommended license, recommended rights, and recommended spending.
On-Premise optimization realized savings	Microsoft Core License Optimization Reports [samp_ms_optimization_report]	Cost savings that you have achieved for licenses on your physical hosts and clusters based on recommended licensing optimizations. **Note:** This report is available only for the following Microsoft license types: • Per core licenses for Microsoft SQL Server and Microsoft BizTalk Server • Per core (with CAL) licenses for Microsoft Windows Server, Microsoft Core Infrastructure Server, and Microsoft System Center Select the report to view details about the cost savings that you have achieved for each host or cluster.

Related topics

- Evaluating software usage activity for Microsoft 365 subscriptions
- Reclamation rules for Microsoft 365 integration
- Microsoft 365 integration

Publisher optimizations for Adobe

View licensing optimizations for Adobe by selecting **Adobe** from the **Publisher** drop-down list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: To view the recommended licensing optimizations for Adobe, you must activate the Software Asset Management Professional for Adobe plugin (com.sn_samp_adobe) on your ServiceNow instance. In addition, you must request and install the Software Asset Management - SaaS License Management Integrations application from the ServiceNow Store.

Report	Source	Description
Creative Cloud user activity as per subscription	Software Subscriptions [samp_sw_subscription]	Number of user subscriptions per month with meaningful activity. This report displays data for all of your Adobe Creative Cloud All Apps subscriptions for the last 12 months. Select any data point to view the last activity date of user subscriptions with meaningful activity for a given subscription type.
Creative Cloud potential savings by type	Removal Candidate [samp_sw_reclamation_candidate]	Potential monthly savings for your Adobe Creative Cloud All Apps licenses that are based on low usage, double licensed users, and consolidated subscriptions. This report displays potential savings for the last 12 months. • **Low usage**: The Adobe Creative Cloud applications not being used for more than 60 days. • **Dual licensed users**: A user having subscription through both Adobe Creative Cloud All Apps and individual Adobe Creative Cloud applications. • **Consolidated subscriptions**: A user having multiple individual Adobe applications (greater than 3 by default) and all these subscriptions are consolidated to one Adobe Creative Cloud All Apps subscription.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
Inactive user subscriptions	Software Subscriptions [samp_sw_subscription]	Number of inactive user subscriptions in the User [sys_user] table of your ServiceNow instance based on the user status.
Unresolved user subscriptions	Software Subscriptions [samp_sw_subscription]	Number of users not having a record in the User [sys_user] table of your ServiceNow instance.

Related topics

Integrating with Adobe Cloud

Microsoft Core License Optimization Reports fields

Field descriptions for the Microsoft Core License Optimization Reports [samp_ms_optimization_report] table.

Microsoft Core License Optimization Reports [samp_ms_optimization_report] table

Field	Description
Product	Microsoft software product that you are optimizing licensing for.
Cluster/Host Type	Indicates whether the recommended licensing optimization applies to a cluster or a standalone physical host.
Virtualization Technology	Virtualization technology that you are using to run virtual machines (VMs) within the cluster or on the standalone physical host.
Cluster/Host Reference	Cluster or standalone physical host that the recommended licensing optimization applies to.
Host Affinity Configured	Indicates if host affinity rules are configured for the cluster. **Note:** Host affinity rules are applicable to clusters only. If the **Cluster/Host Type** field is set to **Cluster**, this field can be set to either **true** or **false**. If the **Cluster/Host Type** field is set to **Standalone Host**, this field is automatically set to **false**.
Number of Hosts	Number of physical hosts. If the **Cluster/Host Type** field is set to **Standalone Host**, this field is set to **1**. If the **Cluster/Host Type** field is set to **Cluster**, this field is set to the total number of physical hosts within the cluster.
Host Cores	Number of cores within each CPU that is assigned to your physical hosts. If the **Cluster/Host Type** field is set to **Standalone Host**, this field is set to the number of cores within each CPU that is assigned to the standalone physical host. If the **Cluster/Host Type** field is set to **Cluster**, this field is set to the number of cores within each CPU that is assigned to a physical host within the cluster.
Number of VMs	Number of VMs within the cluster or on the standalone physical host.
VM Cores	Number of virtual cores within each virtual CPU (vCPU) that is assigned to your VMs. If the **Cluster/Host Type** field is set to **Standalone Host**, this field

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft Core License Optimization Reports [samp_ms_optimization_report] table (continued)

Field	Description
	is set to the number of virtual cores within each vCPU that is assigned to the VMs on the standalone physical host. If the **Cluster/Host Type** field is set to **Cluster**, this field is set to the number of virtual cores within each vCPU that is assigned to the VMs within the cluster.
Number of VMs with software installations	Number of VMs that the Microsoft software product is installed on.
Host Core Licenses Required	Number of rights that are required for licensing either the physical hosts within the cluster or the standalone physical host.
VM Core Licenses Required	Number of rights that are required for licensing the VMs within the cluster or on the standalone physical host.
Current License Consumption	Type of license and total number of rights that you are currently consuming.
Current License Consumption Layer	Layer on which you are currently consuming rights. The options are **Physical**, **Virtual**, and **Physical/Virtual**.
Recommended License Consumption	Type of license and total number of rights that you are recommended to consume.
Recommended License Consumption Layer	Layer on which you are recommended to consume rights. The options are **Physical**, **Virtual**, and **Physical/Virtual**.
Conservative License Consumption	Conservative way to consume rights without applying any licensing optimizations. For example, you can consume rights for your Microsoft Windows Server Data Center or Microsoft SQL Server Enterprise licenses on the host layer.
Conservative License Cost	Total license cost based on the conservative license consumption.
Recommended License Cost	Total license cost based on the recommended license consumption and license consumption layer.
Current License Cost	Total license cost based on the current license consumption and license consumption layer.
Recommended License Applied	Indicates if the recommended licensing optimization has been implemented on the cluster or standalone physical host.
Licensing Status	Licensing status of the cluster or standalone physical host. The options are **Licensed** and **Unlicensed**.
Has Allocation	Indicates if you have enough rights to allocate to the cluster or standalone physical host.
Recommendation Details	Summary of the recommended licensing optimization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft Core License Optimization Reports [samp_ms_optimization_report] table (continued)

Field	Description
Additional Notes	Additional notes about the recommended licensing optimization.
Savings Achieved	Indicates if you have saved money by implementing the recommended licensing optimization.
Realized Savings	Amount of money that you have saved by implementing the recommended licensing optimization.
Potential Savings	Amount of money that you can save by implementing the recommended licensing optimization.

Maturity item details

Fields on the Maturity item details form help you view and update the state and success goal of the maturity item.

Maturity item details

Field	Description
Name	Name of the maturity item.
Type	Type of the maturity item. • Process • End user • SaaS • Data center • Cloud
Short description	A brief summary of the maturity item.
Success goal	Success goal associated to the maturity item. For more information about creating a success goal, see Create success goals for Software Asset Management.
State	Current stage of the maturity item. • New • Work in Progress • Closed Complete • Closed Skipped
Maturity level	Current maturity level. • Crawl • Walk • Run

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Maturity item details (continued)

Field	Description
Suggested maturity level	Suggested maturity level for improved value return of your SAM application. • Crawl • Walk • Run
Start date	The start date of the maturity item.
Completed date	Completed date of the maturity item.
Purpose	Description of the purpose and outcome for the maturity item.
Steps to complete	List of steps of how to accomplish the purpose of the maturity item.
Work notes	Notes about the maturity item, which are visible to all users within your organization.

Maturity stages of your Software Asset Management program

The maturity of your Software Asset Management program is divided into three stages such as Crawl, Walk, and Run.

Maturity stages

Stage	Description
Crawl	Begin your Software Asset Management journey, such as implementing or developing a new Software Asset Management program. At this stage, you can establish a healthy Configuration Management Database (CMDB), identify tools to discover data, and establish processes and roles. You can focus on End-user computing or SaaS integrations for which licensing isn't complex.
Walk	Begin establishing processes, procedures, policies, resources, and tools to execute on the roadmap of the Software Asset Management program. You can automate the manual processes and procedures, which you've established during the Crawl stage. Move to more complex licensing models in datacenter environments, Bring your own license (BYOL) use cases, and additional SaaS publishers. You can consider additional governance and cost control through software metering and reclamation, identify overlapping software, and rightsize software estate through compliance results.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Maturity stages (continued)

Stage	Description
Run	Establish and use mature, standardized, and automated processes and procedures for centralized software assets tracking and system management. You use the standard catalog and onboarding process for new catalog items in the purchasing process. Provide software to end users through automated on-demand mechanisms and rightsize your software spend. You must also be evaluating processes and establishing Software Asset Management goals regularly.

SAM Success Goal Details

Fields on the SAM Success Goal Details help you create success goals for tracking the success of the Software Asset Management application in your instance.

SAM Success Goal Details

Field	Description
Number	A unique identifier of the success goal.
Title	The title for the success goal.
Status	Status of the success goal. By default, the success goal is in draft status.
Category	The category the success goal belongs to.
Vendor	Vendor or publisher associated to the success goal.
Goal Type	Defines the metrics of your goal. • Savings • Count
Goal Description	A detailed explanation of the success goal.
Group	The group the goal is to be assigned to.
Owner	The user from the group the goal is assigned to.
Projected Start Date	The projected start date for the success goal.
Projected End Date	The projected end date for the success goal.
Actual Start Date	The actual start date of the success goal.
Actual End Date	The actual end date of the success goal.
Projected Savings	Anticipated savings from the success goal. This field is visible only when you set the **Goal Type** as **Savings**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SAM Success Goal Details (continued)

Field	Description
Actual Savings	The actual savings from the success goal. This field is visible only when you set the **Goal Type** as **Savings**.
Projected Count	Anticipated count from the success goal. This field is visible only when you set the **Goal Type** as **Count**.
Actual Count	The actual count from the success goal. This field is visible only when you set the **Goal Type** as **Count**.
Achievement Description	A description of how the success goal was achieved.

Related topics

Create success goals for Software Asset Management

Sample payload for generic software install records

A sample payload that populates the Software Installation [cmdb_sam_sw_install] table in the ServiceNow instance with discovery data collected by third-party discovery sources.

The following is a sample payload for creating software install records for publishers such as Microsoft, IBM. For Oracle, VMware, and Citrix, specialized payloads are used.

In this sample payload, you are passing the information of the installed software, Microsoft Word 2016, and the related CI to inform where it is installed (on a computer CI "SAMILMT8"). You can look up column names in the cmdb_sam_sw_install table and send information by passing the columns, value pairs in the payload. For example, in this payload you are sending the publisher, version and display_name columns. You can also send additional information such as the edition column.

Note: For more information on CI Identifier rules, see Identifier Rules.

```
{ 'items': [{'className':'cmdb_ci_computer',
                'related': [{
                             className:'cmdb_sam_sw_install',
                             values: {
                               'publisher':'Microsoft',
                               'version':'2016',
                               'display_name':'Word'
                               }
                          }
                    ],
                  'values': {'name':'SAMILMT8'}
                            }]
             }
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Element	Value	Description
className	cmdb_ci_computer	The class name of the CI.
className	cmdb_sam_sw_install	The name of the related table in the CMDB application where the CI is to be created.
publisher	Microsoft	The name of the publisher for whom this entry is being created in the table.
version	2016	The version of the software for which this entry is created in the table.
display name	Word	The display name for this entry in the table.
name	SAMILMT8	Unique identifier of the CI.

Sample payload for Oracle software install records

A sample payload for Oracle publisher pack that populates the Oracle Instance [cmdb_ci_db_ora_instance] table with software install records from third-party discovery sources.

After you discover Oracle software installs via your discovery source, send a payload that contains the Oracle Instance and the Oracle options associated with the Oracle Instance.

Note: In the Properties page, make sure to select the Enable scheduled jobs when using third party Datasource Integration Framework [com.snc.samp.ire.datasource.integration] property.

When the schedule job, SAM- Software Asset Connections, runs, it looks for records with null software installs, populates the software install field in the Oracle Instance table and creates the software install record associated to the instance.

The following is a sample payload to create software install records for Oracle in the Oracle Instance [cmdb_ci_db_ora_instance] table. The sample input contains a list of CIs and relationships that exist between these CIs. The payload states that there is an Oracle database, Dev development 1969 with a standard edition. The Oracle database has many Oracle options enabled such as Armstrong, Aldrin, Collins and runs on a Linux server.

```
{
  'items': [
    {
      'className': 'cmdb_ci_db_ora_instance',
      'related': [
        {
          'className': 'samp_oracle_options',
          'values': {
            "option": "Armstrong",
            "currently_used": "true"
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
          }
        },
        {
          'className': 'samp_oracle_options',
          'values': {
            "option": "Aldrin",
            "currently_used": "true"
          }
        },
        {
          'className': 'samp_oracle_options',
          'values': {
            "option": "Collins",
            "currently_used": "true"
          }
        }
      ],
      'values': {
        'name': 'Dev development 1969',
        'edition': 'Standard',
        'sid': '1-2-569',
        'version': '11.2'
      }
    },
    {
      'className': 'cmdb_ci_linux_server',
      'values': {
        'name': 'CI DATAI 6-002',
        'mac_address': '4653XYZAA',
        'ip_address': '10.10.10.8',
        'asset_tag': 'HWR0003',
        'assigned_to': 'a8f98bb0eb32010045e1a5115206fe3a',
        'cpu_count': '16',
        'cpu_manufacturer': '820351a1c0a8018b67c73d51c074097c',
        'manufacturer': '820351a1c0a8018b67c73d51c074097c',
        'os': 'Linux Red Hat',
        'os_version': '2.6.9-22.0.1.ELsmp',
        'ram': '2014'
      }
    }
  ],
  'relations': [
    {
      'type': 'Runs on::Runs',
      'parent': 0,
      'child': 1
    }
  ]
}
```

Element	Value	Description
className	cmdb_ci_db_ora_instance	Name of the related Oracle instance table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Element	Value	Description
className	samp_oracle_options	Name of the Oracle database option table.
option	Armstrong	Name of the Oracle database option.
currently_used	true	Indicates the Armstrong option is currently enabled.
className	samp_oracle_options	Name of the Oracle database option table.
option	Aldrin	Name of the Oracle database option.
currently_used	true	Indicates the Aldrin option is currently enabled.
name	Dev Development 69	Name of the Oracle database.
edition	standard	Edition of the Oracle database.
sid	1-2-569	Oracle system ID.
version	11.2	Version of the Oracle database.
className	cmdb_ci_linux_server	Name of the related Linux Server table.
mac address	4653XYZAA	MAC address of the interface in the Linux server.

Sample payload for VMware software install records

A sample payload for VMware publisher pack that populates the VMware Discovered License key consumption [samp_vmware_license_key_usage] table with software install records from third-party discovery sources.

After you discover software installs via your discovery source, send a payload via the IRE REST API endpoint to the ServiceNow instance to populate the VMware Discovered License key consumption [samp_vmware_license_key_usage] table with software install records.

Note: In the Properties page, make sure to select the Enable scheduled jobs when using third party Datasource Integration Framework [com.snc.samp.ire.datasource.integration] property.

1. Send a payload to create a license key in the VMware Discovered License key [samp_vmware_license_key] table.
2. From the response body of the payload, copy the sys ID of the new license key and paste it in a text editor for later use.
3. Use the Enhanced IRE API to query the sys IDs of the CIs that use the new license key.
4. From the response body, copy the sys IDs of the CIs and paste them in a text editor for later use.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Send a payload with the sys ID of the license key and the sys ID of the CIs.
6. Run the schedule job, SAM- Update Software Usage to populate the VMware Discovered License key consumption [samp_vmware_license_key_usage] table with the software install records.

```
Request Body
{ 'items': [
               {'className':'cmdb_ci_vcenter',
             'related': [
                         {
                         className:'samp_vmware_license_key',
                           values:{
                            'cost_unit':'cpuPackage',

 'edition':'esxEnterprisePlus.vram',

 'features':'autodeploy,das,dpvmotion',

 'license_key':'SYDOJ-28J5Q-78X48-0NC24-REKAR',
                                        'product_name':'VMware
 vSphere 5 Enterprise Plus',
                                        'product_version':'5.0',
                                        'rights_owned':'8',
                                        'rights_used':'6'
                                  }
                         }

                        ],
             'values': {
                'name':'VCenter Ref 1A'
                 }
             },
             {
               'className':'cmdb_ci_win_server',
                'values': {'name':'VirtualMachine-WS2'
                           }
                    }
             ],
             'relations':[{
                  'type':'Runs on::Runs',
                  'parent':0,
                  'child':1
                }]
          }

Response Body
{
  "result": {
    "items": [
      {
        "className": "cmdb_ci_vcenter",
        "operation": "INSERT",
        "sysId": "8fb47793e7cc10107aea07d8d2f6a93a",
        "relatedSysIds": [
          "cbb47793e7cc10107aea07d8d2f6a93f"
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
      ],
      "relatedItems": [
        {
          "className": "samp_vmware_license_key",
          "sysId": "cbb47793e7cc10107aea07d8d2f6a93f",
          "markers": [],
          "inputIndices": [
            {
              "mainIndex": 0,
              "subIndex": 0
            }
          ]
        }
      ],
      "additionalRelatedItems": [],
      "identifierEntrySysId": "Unknown",
      "identificationAttempts": [
        {
          "attributes": [
            "name"
          ],
          "identifierName": "VMWare VCenter Ref CI",
          "attemptResult": "NO_MATCH",
          "searchOnTable": "cmdb_ci_vcenter",
          "hybridEntryCiAttributes": []
        }
      ],
      "errorCount": 0,
      "markers": [],
      "inputIndices": [
        0
      ]
    },
    {
      "className": "cmdb_ci_win_server",
      "operation": "UPDATE",
      "sysId": "30ccb31ddbe7720087b9fd441d961992",
      "identifierEntrySysId":
"556eb250c3400200d8d4bea192d3ae92",
      "identificationAttempts": [
        {
          "attributes": [
            "serial_number",
            "serial_number_type"
          ],
          "identifierName": "Hardware Rule",
          "attemptResult": "SKIPPED",
          "searchOnTable": "cmdb_serial_number",
          "hybridEntryCiAttributes": []
        },
        {
          "attributes": [
            "serial_number"
          ],
          "identifierName": "Hardware Rule",
          "attemptResult": "SKIPPED",
          "searchOnTable": "cmdb_ci_hardware",
```


© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
            "hybridEntryCiAttributes": []
          },
          {
            "attributes": [
              "name"
            ],
            "identifierName": "Hardware Rule",
            "attemptResult": "MATCHED",
            "searchOnTable": "cmdb_ci_hardware",
            "hybridEntryCiAttributes": []
          }
        ],
        "errorCount": 0,
        "markers": [],
        "inputIndices": [
          1
        ]
      }
    ],
    "additionalCommittedItems": [],
    "relations": [
      {
        "className": "cmdb_rel_ci",
        "operation": "INSERT",
        "sysId": "43b47793e7cc10107aea07d8d2f6a940",
        "identifierEntrySysId": "Unknown",
        "errorCount": 0,
        "markers": [],
        "inputIndices": [
          0
        ]
      }
    ],
    "additionalCommittedRelations": []
  }
}

From this we get the samp_vmware_license_key sys id
"relatedSysIds": [
          "cbb47793e7cc10107aea07d8d2f6a93f"
        ]

-- Obtaining the CI sys id (POST)
role: sam_admin


https://k8s0057813-node1.thunder.lab3.service-now.com/api/now/id
entifyreconcile/queryEnhanced?sysparm_data_source=ServiceNow

Request Body
{ 'items': [ {'className':'cmdb_ci_win_server', 'values':
 {'name':'Server-WS11'} }]}

Response Body
{
  "result": {
    "items": [
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
      {
        "className": "cmdb_ci_win_server",
        "operation": "UPDATE",
        "sysId": "99ccb31ddbe7720087b9fd441d9619da",
        "identifierEntrySysId":
 "556eb250c3400200d8d4bea192d3ae92",
        "identificationAttempts": [
          {
            "identifierName": "Hardware Rule",
            "attemptResult": "SKIPPED",
            "attributes": [
              "serial_number",
              "serial_number_type"
            ],
            "searchOnTable": "cmdb_serial_number",
            "hybridEntryCiAttributes": []
          },
          {
            "identifierName": "Hardware Rule",
            "attemptResult": "SKIPPED",
            "attributes": [
              "serial_number"
            ],
            "searchOnTable": "cmdb_ci_hardware",
            "hybridEntryCiAttributes": []
          },
          {
            "identifierName": "Hardware Rule",
            "attemptResult": "MATCHED",
            "attributes": [
              "name"
            ],
            "searchOnTable": "cmdb_ci_hardware",
            "hybridEntryCiAttributes": []
          }
        ],
        "markers": [],
        "inputIndices": [
          0
        ],
        "mergedPayloadIds": [],
        "errorCount": 0
      }
    ],
    "additionalCommittedItems": [],
    "relations": [],
    "additionalCommittedRelations": []
  }
}
```

```
where  "sysId": "99ccb31ddbe7720087b9fd441d9619da" is the sys id
 of the ci/used_by
```

```
// create usage table
POST
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
https://k8s0057813-node1.thunder.lab3.service-now.com/api/now/table/samp_vmware_license_key_usage?sysparm_fields=sys_id

{"license_key":"cbb47793e7cc10107aea07d8d2f6a93f","rights_used":"1","used_by":"99ccb31ddbe7720087b9fd441d9619da"}
```

Element	Value	Description
className	cmdb_ci_vcenter	Name of the table related [samp_vmware_license_key] table
className	samp_vmware_license_key	Name of the table where the license key is created.
className	cmdb_ci_win_server	The name of the Windows server table
name	VirtualMachine-WS2	Name of the Windows server virtual machine.

Sample payload for Citrix software install records

A sample payload for the Citrix publisher pack that populates the Software Installation [cmdb_sam_sw__install] table with software install records from third-party discovery sources.

The Citrix publisher pack supports two products: virtual applications and virtual desktop. For these products, Citrix supports concurrent licensing and user/device licensing.

Note: For information on license metrics, see Software License Metrics

The IRE API relies on two CI identifier rules for creating Citrix software install records. The Citrix License server [cmdb_ci_appl_license_server] identifier populates the CAL entries and the Citrix Delivery Controller [cmdb_ci_appl_delivery_controler] identifier creates the software install records.

The CAL entries are used during reconciliation to compare against the purchased rights in entitlements to get the correct license position for Citrix products. The Citrix License server identifier provides information on the samp_concurrent_license_consumption and the samp_user_device_license_consumption tables. Based on your licensing entitlements, you need to populate either of these two tables.

Send a payload to populate the samp_concurrent_license_consumption or the samp_user_device_license_consumption table. Ensure that you mention the key attributes for the tables in the payload:

- samp_concurrent_license_consumption: product_code and number
- samp_user_device_license_consumption: product_code, consumer, and consumer_type

Note: The two tables are passed in one payload since both are related entries of the parent CI table, cmdb_ci_appl_license_server. In the payload, specify the relationship between the tables and the CI parent table.

Once you send the payload, entries are created in the samp_concurrent_license_consumption and the samp_user_device_license_consumption tables. Now execute the scheduled job, SAM-Create Citrix CAL entries, to update the Client Access [samp_sw_client_access] table. Client access records are created for each product with user/device count.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Ensure that you configure the schedule job, SAM- Create Citrix CAL entries to execute after processing the payload successfully.

Using the Citrix Delivery Controller [cmdb_ci_appl_delivery_controler] identifier, send a payload to populate all the 7 Citrix tables. Make sure that you mention the key attributes for the 7 tables in the payload.

Note: Click **Related Entries** in the Citrix Delivery Controller identifier to look up the key attributes (**Criterion attributes**) for the Citrix tables.

Once the entries are created in the tables, execute the scheduled job, SAM- Create Citrix Software installs. The Citrix sofware install records are created in the Software Installation [cmdb_sam_sw_install] table.

```
{ 'items': [{'className':'cmdb_ci_appl_license_server',
             'related': [
                         {

 'className':'samp_concurrent_license_consumption',
                           'values':{
                            'product_code':'MW2ZPSE0001',
                            'in_use_count':511,
                            'overdraft':11,
                            'pooled_available':0,
                            'total_count':500
                             }
                          },
                          {

 'className':'samp_user_device_license_consumption',
                           'values':{
                            'product_code':'XDT_PLT_CCS',
                            'consumer':'consumer1',
                            'consumer_type':'user'

                             }
                          },
                           {

 'className':'samp_user_device_license_consumption',
                           'values':{
                            'product_code':'XDT_PLT_CCS',
                            'consumer':'Device1',
                            'consumer_type':'device'
                             }
                          },
                           {

 'className':'samp_user_device_license_consumption',
                           'values':{
                           'product_code':'XDT_PLT_CCS',
                            'consumer':'consumer2',
                            'consumer_type':'user'
                             }
                          },
                           {
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
'className':'samp_user_device_license_consumption',
                          'values':{
                          'product_code':'XDT_PLT_CCS',
                           'consumer':'consumer3',
                           'consumer_type':'user'
                            }
                        },
                        {

'className':'samp_user_device_license_consumption',
                          'values':{
                          'product_code':'XDT_PLT_CCS',
                           'consumer':'consumer4',
                           'consumer_type':'user'
                            }
                        },
                        {

'className':'samp_user_device_license_consumption',
                          'values':{
                          'product_code':'MW2ZPSE0001',
                           'consumer':'consumer5',
                           'consumer_type':'user'
                            }
                        },
                         {

'className':'samp_user_device_license_consumption',
                          'values':{
                           'product_code':'MW2ZPSE0001',
                           'consumer':'Device1',
                           'consumer_type':'device'
                            }
                        }
                    ],
            'values': {
                'name': 'ACME License Server 2',
                'tcp_port': 22,
                 'install_directory': 'Documents'
                }
            },
            {
              'className':'cmdb_ci_win_server',
              'values': {'name':'samlabvm450'}
                    }
            ],
            'relations':[{
                 'type':'Runs on::Runs',
                 'parent':0,
                 'child':1
               }]
          }
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sample payload for BYOL

A sample payload that populates the Software Installation [cmdb_sam_sw_install] table in the ServiceNow instance with discovery data collected by the BYOL licensing model.

Certain entities need to be populated for BYOL to work with software asset connection as a third party discovery source. The relationship between these entities is crucial for BYOL to work smoothly with software asset connections. For example, some values required for populating Cloud Hosts is different for AWS and Azure. Though the object ID and the name of the host is required for both AWS and Azure, for AWS, the CPU core count is required and for Azure, the host type value is required. For details on entities and their relationships, refer to Entities for BYOL and Relationships between the entities for BYOL.

In this example, Cloud Service Account is the topmost entity. All the other entities listed in the Entities for BYOL table are dependent entities of Cloud Service Account. If an entity is marked as a dependent entity, then the parent entity and the relationship between that entity and it's parent needs to be mentioned in the same payload. For example, if you want to create an AWS data center on Cloud Service Account, you need to include the Cloud Service Account entity in the same payload; even if Cloud Service Account already exists in your instance. Similarly, when you create software installations, you need to include all the dependent entities for software installations all through the hierarchy in the same payload.

Entities for BYOL

Entities	Required fields
Cloud Service Account [cmdb_ci_cloud_service_account]	account_id – Unique identifier
AWS Datacenters [cmdb_ci_aws_datacenter]	object_id – Unique identifier
Azure Datacenters [cmdb_ci_azure_datacenter]	object_id – Unique identifier
Cloud Hosts [cmdb_ci_cloud_host] **Note:** Not needed for shared VMs.	• object_id – Unique identifier • name - name of the host • host_type - host type for Azure. For example, DSv3-Type1 (for Azure hosts only). • cpu_core-count - Total CPU core count of the host (for AWS hosts only).
Virtual Machine Instances [cmdb_ci_vm_instance]	object_id – Unique identifier
Computers [cmdb_ci_computer]	• name - name of the virtual machine • cpu_count - CPU count of the virtual machine • cpu_core_count - CPU core count of the virtual machine • cpu_core_thread - CPU core thread count of the virtual machine • virtual – indicates if the computer is a VM (always set to true)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Entities	Required fields
Software Installations [cmdb_sam_sw_install] **Note:** Software Installations [cmdb_sam_sw_install] is a related entry for Computers [cmdb_ci_computer]	• publisher • version • display_name • cloud_license_type - license type of the cloud install (BYOL or License Included) • cloud_license_type_source - source from where cloud license type gets populated. The value is set to third_party_integration for Software asset connections.

Relationships between the entities for BYOL

Entity relationships	Type	Parent	Child
AWS/Azure Datacenters – Cloud Service Account	Hosted on::Hosts	AWS/Azure Datacenters	Cloud Service Account
AWS/Azure Datacenters – Cloud Hosts	Hosted on::Hosts	Cloud Hosts	AWS/Azure Datacenters
AWS/Azure Datacenters – Virtual Machine Instances	Hosted on::Hosts	Virtual Machine Instances	AWS/Azure Datacenters
Cloud Hosts - Virtual Machine Instances	Runs on::Runs	Virtual Machine Instances	Cloud Hosts
Computers - Virtual Machine Instances	Virtualized by::Virtualizes	Computers	Virtual Machine Instances

Sample payload for Computer and Installations for dedicated VM (similar for AWS and Azure)

In this sample payload, a dedicated computer record is being passed. This computer record has a related array that contains all the software installations. A VM instance corresponds to the computer record. Cloud host is the dedicated host on which the virtual machine resides and the AWS datacenter is to be created on the Cloud Service Account. If you have multiple dedicated virtual machines, you can send one REST API for each dedicated virtual machine. For example, if you have 50 dedicated VMs, you need to send 50 REST API calls each having the same payload. All the software installations on a dedicated VM can be sent in a single payload in the related array.

```
var payload = {

  'items': [{

    'className': 'cmdb_ci_computer',

    'values': {
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
      'name': 'Comp - Dedicated AWS - 1',
      'cpu_count': 1,
      'cpu_core_count': 4,
      'cpu_core_thread': 1,
      'virtual': true
    },
    'related': [{
      'className': 'cmdb_sam_sw_install',
      'values': {
        'publisher': 'Microsoft',
        'display_name': 'SQL Server',
        'version': '2017',
        'cloud_license_type': 'BYOL',
        'cloud_license_type_source': 'third_party_integration'
      }
    }]
  }, {
    'className': 'cmdb_ci_vm_instance',
    'values': {
      'object_id': 'sample_object_id_aws_vm_dedicated',
      'name': 'VM Dedicated AWS - 1',
    }
  }, {
    'className': 'cmdb_ci_cloud_host',
    'values': {
      'object_id': 'sample_object_id_aws_host',
      'name': 'AWS Dedicated Host - 1',
      'cpu_core_count': 32
    }
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
  }, {
    'className': 'cmdb_ci_aws_datacenter',
    'values': {
      'object_id': 'sample_object_id_aws_dc',
      'name': 'AWS DataCenter - 1'
    }
  }, {
    'className': 'cmdb_ci_cloud_service_account',
    'values': {
      'account_id': 'sample_account_id_aws_service_account',
      'name': 'Cloud Service Account AWS - 1'
    }
  }],
  'relations': [{
      'type': 'Virtualized by::Virtualizes',
      'parent': 0,
      'child': 1
    }, {
      'type': 'Runs on::Runs',
      'parent': 1,
      'child': 2
    },
    {
      'type': 'Hosted on::Hosts',
      'parent': 2,
      'child': 3
    }, {
      'type': 'Hosted on::Hosts',
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
      'parent': 3,
      'child': 4
    }
  ]
}

 var jsonUntil = new JSON();
var input = jsonUntil.encode(payload);
gs.info("Input: " + input.toString());
var options = {
  "partial_payloads": false,
  "deduplicate_payloads": true
};
var output =
 SNC.IdentificationEngineScriptableApi.createOrUpdateCIEnhanced(
'ServiceNow', input, options);
gs.print("Output:" + output);
```

SAM Success Activity

Fields on the SAM Success Activity form help you create success activities to track the success of your created goals.

SAM Success Activity

Field	Description
Number	A unique identifier of the success activity.
Success Goal	The success goal that the activity is being associated to.
State	The current state of the success activity. Choose from the following options: • Pending • Open • Closed Complete • Closed Incomplete • Closed Skipped
Assignment group	The group this activity is assigned to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SAM Success Activity (continued)

Field	Description
Assigned to	A particular person in the assigned group.
Short description	A short description of the success activity.
Description	A detailed description of the success activity.
Work notes	Notes relating to the success activity.

SaaS detection report

Use the SaaS detection report to discover and manage all SaaS applications accessed via a browser and configured within the ServiceNow® Agent Client Collector for Visibility Content (ACC-VC) product. The SaaS applications that can be managed through this report can be paid or free ones.

Important: To view the SaaS detection report, you must do the following:

- Request and install the latest version of the Software Asset Management -SaaS License Management application from the ServiceNow Store. For more information, see Request SaaS License Management.
- Install the Agent Client Collector for Visibility Content (ACC-VC) product version 1.9.0 or later. For more information, see Agent Client Collector.

You can use this report to manage shadow IT spend by viewing all the users who access these applications and their usage patterns. You can also see how long each application has been in use.

Note:

- The data in the SaaS detection report reflects ACC-VC's retention period, which is 30 days by default. The default value can be modified as needed.
- SaaS URL data in the SaaS detection report are read-only and can't be edited directly from the report.

View this report by navigating to **Software Asset Workspace** > **License usage** > **Reports**. Additionally, you can view URL details on the URL Discovery Insights dashboard in the Discovery Admin Workspace. For further information, see URL Discovery insights dashboard.

The SaaS detection report includes domain-separated data when Domain Support - Domain Extensions Installer (com.glide.domain.msp_extensions.installer) and Performance Analytics - Domain Support (com.snc.pa.domain_support) are activated.

SaaS detection report fields

Field	Description
Product	The name of the SaaS application that is being discovered.
Publisher	Publisher of the SaaS application. Publisher is a reference to the Software Publishers [samp_sw_publisher] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

SaaS detection report fields (continued)

Field	Description
Is monitored	Indicates whether ACC-VC is monitoring the product or not. • If the product is monitored by the ACC-VC application, the Is monitored value is true. • If the product isn't monitored by the ACC-VC application, the Is monitored value is false.
Managed status	Indicates whether the product is managed or unmanaged. • If a software model exists for a product, the status is Managed. • If a software model doesn't exist for a product, the status is Unmanaged.
URL(s)	URL or multiple URLs for your SaaS application.
Total users	Total number of users who have accessed the product.
Last accessed time	The time when the product was last accessed by a user.
Total accessed time	Total duration for which the product has been accessed by its users.

User Usage Data fields

Field	Description
User ID	User ID of the person who is accessing the application.
Device	Device or CI that is used to access the application.
Date	Last date when the application was accessed.
Total usage time	Total duration for which the application has been accessed by a user.
Domain	Domain URL for the application.

Scheduled jobs for Microsoft 365

Your Microsoft 365 integration profile is set to fetch subscription and usage information automatically from the Microsoft 365 Admin Center on a schedule. If needed, you can also manually run the following scheduled jobs to get this information. Each job must be complete before starting the next one.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sequence	Scheduled job	Run frequency	Description
1	SAM - Import M365 User Subscriptions	Weekly	Imports user subscriptions data for each Microsoft 365 product into the Software Subscription [samp_sw_subscription] table.
2	SAM - Collect Microsoft 365 Usage	Daily	Collects usage data for each Microsoft 365 product in the Software Usages [samp_sw_usage] table.
3	SAM - Create New Reclamation Candidates for Office 365 Integration	Weekly	Generates removal candidates for Microsoft 365 and Office 365.
4	SAM - Microsoft 365 Daily Job	Daily	Populates charts based on the data available in the subscription table and reclamation candidate table.

Related topics

Integrating with Microsoft 365

Scheduled jobs for Adobe

Your Adobe integration profile is set to fetch subscription and usage information automatically from the Adobe portal on a scheduled basis. If needed, you can also run the following scheduled jobs manually to get this information. Each job must be complete before starting the next one.

Scheduled job	Run frequency	Description
SAM - Import Adobe User Subscriptions	Weekly	Imports and updates the Adobe Cloud application subscription data into the Software Asset Management application from the Adobe Admin Console. This data provides visibility into all Adobe user subscriptions and the users to whom the subscriptions are assigned in the Adobe portal. The user subscription data can be viewed in the Software Asset Workspace.
SAM - Optimize Adobe Subscriptions	Monthly	Adobe subscription data is pulled into the Software Asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scheduled job	Run frequency	Description
		Management application when the SAM - Import Adobe User Subscriptions scheduled job runs. When the subscription data is pulled, the SAM - Optimize Adobe Subscriptions scheduled job optimizes the Adobe Creative Cloud subscriptions based on usage.

Reclamation rules for SaaS and SSO applications

Reclaim unused SaaS and Single sign-on (SSO) subscriptions to reduce your total software costs.

Reclamation rules define the minimum amount of time for which a subscription must be used. If the subscription doesn't have any activity within a specified time limit, it's added to the list of reclamation candidates.

For each direct integration, the user activity is defined differently. Only one of the listed activities is required to occur within the specified time limit, not all of them.

⚠ **Warning:** Make sure that users don't lose access to their files when their account is reclaimed. Users can't stop their account from being reclaimed unless the **Notify user** check box is selected on the reclamation rule.

Automatic reclamation is unavailable for some SaaS applications. For these applications, update or remove licenses manually from the application's admin portal.

User subscription reclamation

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
Adobe Cloud	Any user activity	No	NA
Adobe Workfront	• Create or update projects • Create or update tasks • Create or update issues • Create or update portfolios • Create or update programs • Create or update reports • Create or update filters • Create or update documents	Yes	Removes the user's access to the Workfront application. The user is no longer allowed to sign in.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
	• Create or update templates • Create or update expenses		
Aha!	User login **Note:** The analysis period is 60 days.	Yes	Deactivates the account. The user can't log in to the Aha! portal.
Asana	• Tasks created • Tasks completed • Subtasks created • Subtasks completed • Assigning tasks or subtasks • Moving tasks or subtasks between projects • Comments added to tasks or subtasks • Story created	Yes	Deletes the user account. The user can no longer access Asana projects or workspace. Content created by the user remains accessible to other users and the admin can reassign tasks from the Asana dashboard.
Box	• User login • Any file activity, including 60 actions such as create, edit, delete, share, upload, or download	Yes	Deletes the user account. All files are moved into a folder in the Box admin account that authenticated the integration.
Calendly	Schedule an event	Yes	Removes the account from your organization.
Confluence Cloud	Create or update a space, page, blog post, comment, or attachment	Yes	Removes the user from all associated Confluence groups. The user can no longer access the Confluence site, but the content created

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
			by the user remains accessible to other users.
Docusign Account level	Subscription assigned date	Yes	Deletes the account. Docusign admin can access user's files via the Docusign admin portal.
Docusign Organization level	Subscription assigned date	No	NA
Dropbox	• User login • Any file activity, including 60 actions such as create, edit, delete, share, upload, or download	Yes	Deletes the account. All files are moved into a folder (named after deleted user's email) in the Dropbox admin account that authenticated the integration.
Google Workspace	**Google Drive and Google Docs** Any file activity, such as create, edit, delete, upload, download, or synchronize **Gmail** Any email activity, such as read, create, edit, send, or delete	Yes	Deletes the account. All files are moved from Google Drive into a folder (named after deleted user's email) in the Google Workspace admin account. All email messages are deleted when the account is reclaimed. To transfer email messages, use the Google data migration service before reclaiming the account.
GitHub	• Create a commit comment • Create a Git branch or tag	Yes	**GitHub Enterprise Server** Suspends the account. All

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
	• Delete a Git branch or tag • Fork a repository • Create or update a wiki page • Any issue comment activity, such as create, edit, or delete • Any issue activity, such as open, close, reopen, assign, unassign, label, or unlabel • Any repository collaborator activity, such as editing the collaborator access permissions • Make a private repository public • Any pull request activity, such as open, close, reopen, assign, unassign, review, unlabel, and synchronize • Any pull request review comment activity • Push at least one commit to a repository branch or tag • Any release activity, such as publish or edit • Any sponsorship listing activity • Star a repository		issues, comments, repositories, gists, and other data created by the user are preserved. **GitHub Enterprise Cloud** Removes the account from all enterprise organizations. Restoring membership within three months of reclamation restores the user access to private forks of your organization.
GoTo	**GoToMeeting** Host a meeting	Yes	Reclaiming a product license from a GoTo user account removes

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
	GoToWebinar Host a webinar or meeting **GoToConnect** Call using a GoToConnect line		the user's access to that product. Without a license, users can't sign in to the product. If all product licenses are reclaimed, the account is automatically suspended, preventing sign-in to any products.
Jira Software	• Create an issue • Comment on an issue • Update a comment on an issue • Activities in the following categories: ○ Auditing ○ Project changes ○ Permission changes ○ Workflow changes ○ Notification changes ○ Custom field changes ○ Advanced Roadmaps changes	Yes	Removes the user from all associated Jira groups. The user can no longer access the Jira site, but the content created by the user remains accessible to other users.
Looker	User's last login	Yes	Removes the user's access to Looker, preventing sign-in. Usage history and personal content are retained.
Microsoft 365	Any user activity	Yes	Removes the user's access to the application, associated plans, and services. If a user has access to an

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
			application through a group membership, reclaiming the subscription removes the user from the group. Also, it revokes access to the subscription and its associated plans.
Microsoft Dynamics 365 and Power Apps	Create or update the following records in Dynamics 365: • Common entities ○ Account ○ Contact ○ Goal ○ Product ○ User ○ Phone Call ○ Task ○ Letter ○ Email ○ Appointment ○ Fax ○ Custom Activities • Sale-related entities ○ Competitor ○ Opportunity ○ Invoice ○ Order ○ Quote ○ Account ○ msdyn_relationshipinsightsunifiedconfig ○ msdyn_relationshipanalyticsmetadata ○ Lead • Customer Service entities ○ Case ○ Contract	No	NA

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
	○ Queue ○ Service entity activity ○ Incident		
Miro	Access or update a board	Yes	Removes user's access to Miro, preventing sign-in.
monday.com	• Any board activity, such as create, add or remove a note, add or remove a user, and delete • Any item activity, such as add, edit, duplicate, and delete • User's last login	No	NA
PagerDuty	Be on an on-call schedule	Yes	Deletes the account.
Rally	• User's last login • Last activity time	Yes	Removes the user's access to Rally, preventing sign-in.
Roadmunk	• User login • Archive or restore roadmaps	Yes	Deactivates the user.
• Salesforce CRM • Salesforce Marketing Cloud	Last activity	Yes	Deactivates the user.
SAP Ariba	User's last login	No	NA
SAP SuccessFactors	User login	Yes	Deactivates the account.
SAP S/4HANA		No	NA
Slack Enterprise	User login	Yes	Deactivates the user. Messages and files are saved, but the user is removed

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
			from all channels and signed out of workspaces, and can't sign back in.
SmartRecruiters	Any user activity, such as create a job or a job ad.	Yes	Removes access to the application. For example, you might want to reclaim the accounts of users who aren't actively using the application or who have quit the organization.
Smartsheet	User login If event reporting add-on is available on the user's account, the integration tracks user's last activity. For the list of activities, see Event Reporting Reference.	Yes	Based on the Smartsheet licensing model in use: • Legacy model: Removes the user from your organization account. • User-based subscription model (USM): Downgrades the user from a paid Member seat to a free seat type: ○ Users whose domain matches your organization's domain are downgraded to contributor. ○ Users whose domain doesn't match your organization's domain are downgraded to guest. Downgrading a user preserves their data and sheet access on the Smartsheet portal. If a downgraded user does not own any

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
			sheets and has no sheets shared with them, Smartsheet automatically deactivates that user.
Single Sign-on (SSO) subscriptions	Unused subscriptions or subscriptions with limited to no activity.	Yes	Depends on the specific application's integration and configuration.
SurveyMonkey	• User login or logout • Update a group name • Add or delete a member • Update the group member type • Create or resend an invite • Create or update a permission • Create or update a shared view • Create or download an export • Update or delete a respondent • Create or delete grant information • Any survey information activity, such as create, delete, copy, update, and transfer • Any collector information activity, such as create, delete, and update	No	NA
Tableau Cloud	User login	Yes	Removes the user from a site only if they don't own content. If they own content, their site role changes to Unlicensed and

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
			they are removed from groups, but not completely from the site.
Trello	User login **Note:** The analysis period is 60 days.	Yes	Removes user's access to enterprise content or features. You can log in but can't access previously accessed boards and cards.
Webex	**Webex Training** Host a training **Webex Events** Host an event **Webex Support Session** Host a support session **Webex Meetings** Host a meeting **Webex Teams** • Send or update messages • Upload a file • Create or update team space memberships	Yes	Removes the user's access to the specific product. The user can still access other Cisco Webex products and free licenses.
Workplace from Facebook	• Create, update, or view a post in a Workplace group. • Comment on a post in a Workplace group.	Yes	Removes the user's access to Workplace. Account is deactivated, preventing login. Posts, comments,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User subscription reclamation (continued)

Application	Activity considered for reclamation	Is reclamation automated?	What happens after auto-reclamation?
	• Send messages in the Workplace. • Create or update a Workplace Knowledge Library category. • Comment on a Workplace Knowledge Library category. • Create a public event in the Workplace community.		and messages remain available.
Zendesk	User login	Yes	Removes user's access to the Zendesk application, preventing sign-in.
Zoom	• Host a meeting • Host a webinar	Yes	• If the user has Zoom Pro account, they're downgraded to Zoom Basic. • If the user has Zoom Basic account, their license is removed. All cloud-recorded meetings are deleted, but the locally saved recordings aren't affected. • If the user has Zoom Webinar, the Zoom Webinar license is removed.

Related topics

- Reclamation rules for Adobe integration
- Reclamation rules for Microsoft 365 integration

Reclamation rules for Microsoft 365 integration

Reclamation rules for Microsoft 365 integration sets the minimum usage threshold for a subscription. If a subscription remains inactive for a specified period, Software Asset Management marks the subscription as a potential reclamation candidate.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reclamation rule	Justification	Description
• Power BI • Exchange Online • SharePoint Online • OneDrive for Business • Teams • Project • Planner • Visio Online • Microsoft 365 Copilot	Low Usage	If these individual subscriptions show low usage, Software Asset Management recommends reclaiming the low usage subscriptions.
Office 365	• Low Usage • Downgrade	• **Low usage** For example, if Office 365 individual subscriptions or subscriptions suites show low usage, Software Asset Management recommends reclaiming the low usage subscriptions. • **Downgrade** For example, if an Office 365 E5 subscription including advanced features and capabilities with Power BI isn't being used, Software Asset Management recommends switching to a downgraded Office 365 E3 subscription.
Microsoft 365	• Overlapping • Low Usage • Downgrade • Consolidate **Note:** The Overlapping and Consolidate use cases are applicable to all Microsoft 365 integration subscriptions.	• **Overlapping** For example, both Microsoft 365 E3 and Office 365 E3 subscriptions exist, leading to unnecessary duplicate access to Office applications and additional services already included in Microsoft 365 E3. Software Asset Management recommends reclaiming the Office 365 E3 subscriptions and using the Microsoft 365 E3 subscriptions instead.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reclamation rule	Justification	Description
		• **Low usage** For example, if Microsoft 365 individual subscriptions or subscriptions suites show low usage, Software Asset Management recommends reclaiming the low usage subscriptions. • **Downgrade** For example, if a Microsoft 365 E5 subscription including advanced features and capabilities with Power BI isn't being used, Software Asset Management recommends switching to a downgraded Microsoft 365 E3 subscription. • **Consolidate** For example, if Office 365 Enterprise E5, Windows, and EMS subscriptions exist, Software Asset Management recommends using a single license such as Microsoft 365 Enterprise E5 to cover these multiple products at a lower cost.

Related topics

- Review a software reclamation rule
- Evaluating software usage activity for Microsoft 365 subscriptions
- Publisher optimizations for Microsoft
- Integrating with Microsoft 365

Reclamation rules for Adobe integration

Reclamation rules for Adobe integration set the minimum usage threshold for a subscription. If a subscription remains inactive for a specified period, the Software Asset Management application marks the subscription as a potential reclamation candidate.

The Software Asset Management application automatically provides base system reclamation rules when you create an integration profile for Adobe Cloud. You can customize these rules based on your specific activity thresholds, such as 15, 30, 90, or 180 days. For more information, see Review a software reclamation rule.

By default, a threshold of three single apps is set to determine whether an Adobe Creative Cloud All Apps subscription should be used instead of Single App or individual products subscriptions. However, you can review and adjust this threshold based on your requirements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft 365 Apps Usage Reports

Find the last activity date for Microsoft 365 products to determine reclamation candidates.

The values for each field in the Microsoft 365 Apps Usage Reports [samp_m365_apps_usage_report] table are populated using the Microsoft Graph APIs. The **Last Activity Date** helps in determining reclamation candidates more accurately for the supported Microsoft 365 products, including Microsoft Outlook, Word, PowerPoint, Excel, Teams, and OneNote.

Microsoft 365 Apps Usage Reports

Field	Description
User Principal Name	Email address of the user.
Last Activity Date	Date the software product was last used.
Last Activation Date	Date on which the software product license was last activated for the user.
Report Period	Number of days for no meaningful activity before a user account is added to the list of reclamation candidates. The default value is 30 days.
Report Refresh Date	Date of the last refresh of the report.
Windows	Indicates usage of Windows with the value True or False.
Mac	Indicates usage of macOS with the value True or False.
Excel (Mac)	Indicates usage of Microsoft Excel on macOS with the value True or False.
PowerPoint (Mac)	Indicates usage of Microsoft PowerPoint on macOS with the value True or False.
Outlook (Mac)	Indicates usage of Microsoft Outlook on macOS with the value True or False.
Word (Mac)	Indicates usage of Microsoft Word on macOS with the value True or False.
OneNote (Mac)	Indicates usage of Microsoft OneNote on macOS with the value True or False.
Teams (Mac)	Indicates usage of Microsoft Teams on macOS with the value True or False.
Excel (Windows)	Indicates usage of Microsoft PowerPoint on Windows with the value True or False.
PowerPoint (Windows)	Indicates usage of Microsoft PowerPoint on Windows with the value True or False.
Outlook (Windows)	Indicates usage of Microsoft Outlook on Windows with the value True or False.
Word (Windows)	Indicates usage of Microsoft Word on Windows with the value True or False.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Microsoft 365 Apps Usage Reports (continued)

Field	Description
OneNote (Windows)	Indicates usage of Microsoft OneNote on Windows with the value True or False.
Teams (Windows)	Indicates usage of Microsoft Teams on Windows with the value True or False.

Subscription downgrade configuration

Determine various downgrade configurations of SaaS applications and view the downgrade order based on the conditions.

Subscription downgrade configuration

Field	Description
Display name	Name of the supported downgrade configuration.
Source identifier name	Name of the SaaS application that is currently being used.
Destination identifier name	Name of the SaaS application that can be downgraded to.
Source identifier	Subscription identifier of the SaaS application that is currently being used.
Destination identifier	Subscription identifier of the SaaS application that can be downgraded to.
Active	Shows whether the downgrade configuration is active.

Pricing model for Oracle Java SE Universal

Tier-based monthly subscription price per employee is based on the number of employees directly or indirectly working in an organization.

The Price tier [samp_price_tier] table supports the Employee license metric of the Java SE software model and contains read-only values. This table is shipped with the Software Asset Management Professional for Oracle (com.snc.samp.oracle) plugin.

This table populates the override license cost records for Oracle Java. When you're using a custom tier table, you can update the override license cost records associated with the Oracle Java software model. For details, see Create or update an override license cost record.

Price tier table

Number of employees	Monthly subscription cost per employee
1–999	$15
1,000-2,999	$12
3,000-9,999	$10.50
10,000-19,999	$8.25

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Price tier table (continued)

Number of employees	Monthly subscription cost per employee
20,000-29,999	$6.25
30,000-39,999	$5.70
40,000-49,999	$5.25

Software EOL request fields

Use the Software EOL request form to create a software end of life (EOL) request for software products in your asset estate that are reaching or have reached EOL.

Software EOL request form

Field	Description
Number	A unique identifier for the EOL request.
Company	Name of the publisher of the software product.
Product	Name of the software product.
Edition	Edition of the software.
Version	Licensable version of the software.
Full version	The granular licensable version of the software.
Justification	Reason for starting the EOL request on the software.
Stage	The stage of the software EOL request. The default stage is **Draft**. Possible values include: • Draft • Open • Analysis • Action initiated • Completed • Cancelled
Action initiated	The action taken to manage EOL risk. Possible values include: • Pending • Remove EOL software • Upgrade • Purchase support • Move to Azure • Accept risk

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Version type	Version type values include: • Version (build version) • Full version (main version) **Note:** You can manage EOL risk either for a version or full version of a software product.
Priority	Priority of the software EOL request.
Assignment group	The group from which an individual is selected to complete the software EOL request.
Assignment to	The individual assigned to complete the software EOL request, who is selected from the **Assignment group**.
Short description	A brief description of the task.
Description	A detailed description of the task.
Work notes	Information about how the EOL workflow task is resolved.

Software EOL tasks tab

Field	Description
Number	A unique identifier for the software EOL task.
Name	Name of the software EOL task.
Software EOL request	The identifier of the software EOL request.
Parent	The identifier of the parent task.
State	The state of the software EOL task. The default state is **Open**.
Action	Indicates the action that you can take after deciding an IT strategy. Possible values include: • Remove EOL software: Remove the EOL software product from the asset inventory. • Upgrade: Upgrade to the latest or the supported software version. • Purchase support: Purchase additional support for maintenance. • Move to Azure: Migrate to Microsoft Azure. This action is available only for Microsoft products. • Accept risk: Accept risks associated with the EOL software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	This field appears only when the value selected in the **Name** field is **Decide on IT strategy**.
Priority	Priority of the software EOL task.
Assignment group	The group from which an individual is selected to complete the software EOL task.
Assigned to	The individual assigned to complete the software EOL task, who is selected from the **Assignment group**.
Short description	A brief description of the task.
Description	A detailed description of the task.
Notes	Additional information about the EOL task.
Work notes	Information about how the software EOL task is resolved.

User device license consumption fields

SAM managers can view the client access license (CAL) usage details for Microsoft Windows Server in the User Device License Consumption table and create CAL records.

The User Device License Consumption [samp_user_device_license_consumption] table is populated with the CAL usage logging data for the Windows Server. The data is accessed from ServiceNow Discovery.

To learn more about Microsoft usage access logging for CAL, see Microsoft User Access Logging.

For more information on Microsoft specific license metrics, see Supported Microsoft 365 license types.

The User Device License Consumption table is a child table of the Configuration Item [cmdb_ci] table.

User Device License Consumption form

Field	Description
Domain	Domain to which the data belongs.
Consumer	User ID or IP address of the client device that is used to access a role or a service.
License category	The functional category of the CAL. This field is populated only when the license is of CAL type. For example, Microsoft supports User CAL, Device CAL, and Per Core (with CAL) license metrics.
Publisher	The publisher of the license consumption record.
Consumer type	Type of consumer license: User or Device

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User Device License Consumption form (continued)

Field	Description
Product name	The name of the product for which the license consumption record is created.
Activity count	The number of times a particular user or device accesses a role or service.
Source	The CI record for license consumption.
Discovery source	Discovery source for which license consumption is evaluated.
Product code	The code of the product for which the license consumption record is created.

User resolution rule fields

Fields on the User Resolutions Rules page help you create a rule to map the **User** field in the Software Subscription [samp_sw_subscription] table to an associated user in the User [sys_user] table within the ServiceNow AI Platform.

User Resolution Rules

Field	Description
Display name	Name of the user resolution rule.
Active	Option for enabling the user resolution rule. If this check box is cleared, this rule isn't applied to resolve user subscriptions.
Category	Category of the integration profile that the user resolution rule applies to. • **SaaS** • **SSO** By default, this field value is set to **SaaS**.
Source table	Table that contains subscription records. Select **Software Subscription [samp_sw_subscription]**. This field appears only when **SaaS** is selected from **Category**.
Look up table	This field is automatically set to **User**.
Applies to	One or multiple integration profiles to which the user resolution rule applies to. This field appears only when **SaaS** is selected from **Category**.
Source field	A field in the Software Subscription [samp_sw_subscription] table used for lookup

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User Resolution Rules (continued)

Field	Description
	against the User [sys_user] table, such as User principal name and External user id. As other columns might not contain sufficient data, select either **User principal name** or **External user id**. This field appears only when **SaaS** is selected from **Category**.
Look up field	The field against which you want to match the Source field value. For example, if you select **User principal name** in **Source field** and **Email** in **Look up field**, Software Asset Management tries to match these two fields. The match must be exact. If it isn't, you can change the value to **User ID** in **Look up field**. **Note:** User resolution rules created for non-indexed Look up fields in the sys_user table are automatically marked as inactive. This applies to both manually created and AI-generated user resolution rules.
Apply transform on input	Option to apply transformations to the **Source field** value. • **None**: The **Source field** value is matched exactly with the **Lookup field** value. • **Remove domain**: If you have selected **Email** in **Look up field**, the first part of the email address (before the @ symbol), which is the User ID or name, is matched with the Source field value. • **Replace domain**: When you have selected **Email** in **Look up field** and you want to replace the domain name, that is, the second part of the email address (after the @ symbol). For example, replace `example.com` with `exampletest.com`. • **Run script**: This option is available only to administrators for updating the script.
New domain	The new domain that you want to add after the @ symbol when **Email** is selected in **Look up field**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User Resolution Rules (continued)

Field	Description
	This field appears only when **Replace domain** is selected from **Apply transform on input**.
Script	**Important:** This field is available only to administrators. If the mapping still fails after replacing or removing the domain or the logic is complex, the script can be updated to achieve the desired result.

Related topics

Associate a user with subscription records

Domain separation and Software Asset Management

Domain separation is supported in Software Asset Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Enhanced

- Includes all aspects of **Basic** and **Standard** levels of support.
- Data-driven process enables service provider customers to modify business logic that is based on defined use cases. These configurations are UI-based and fail-safe so that configurations by one customer cannot affect another.
- Tenants of the instance must be able to configure minimum viable product (MVP) business logic and data parameters for themselves. This logic and parameters would be expected for the application's normal function.

Sample use case: Tenant-customers of a shared environment must be able to modify the impact, urgency, or priority matrix to set priority within their domain.

For more information on support levels, see Application support for domain separation.

Domain separation support

Domain separation in Software Asset Management enables service providers to offer managed Software Asset Management services to their customers. It also enables large organizations to manage their subsidiaries as independent domains.

With multi-tenant support for Software Asset Management, you can manage the entire Software Asset Management lifecycle for your customers in a shared ServiceNow instance. This model provides complete data and process separation between tenants, along with tenant admin support.

Service provider benefits

Multi-tenant support for Software Asset Management offers the following benefits to service providers:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Expand the service portfolio to include Software Asset Management.
- Offer Software Asset Management as a service to your users that includes:
  - Contract and entitlement management
  - Discovery and normalization reporting
  - Software reconciliation, optimization, and licensing expertise
  - Audit response
  - Software lifecycle and vulnerability reporting
  - SaaS license management
  - Engineering license management

Customer benefits

Customers gain the following benefits when a service provider manages their assets on the shared ServiceNow instance:

- Access to established Software Asset Management services and processes delivered by domain experts
- No platform or process ownership required from the customer

How domain separation works in Software Asset Management

In Software Asset Management, domain separation occurs in two stages: data separation and process separation. From the Paris release, both data and process are domain-separated.

Any user with sam_integrator role has access to create and modify the SaaS integration profiles. Since users with this role can also access the Oauth application registry (currently not domain-separated, so records across all domains are visible), this sam_integrator role should be assigned with caution. The user should be in the service provider organization and satisfy high permissions criteria.

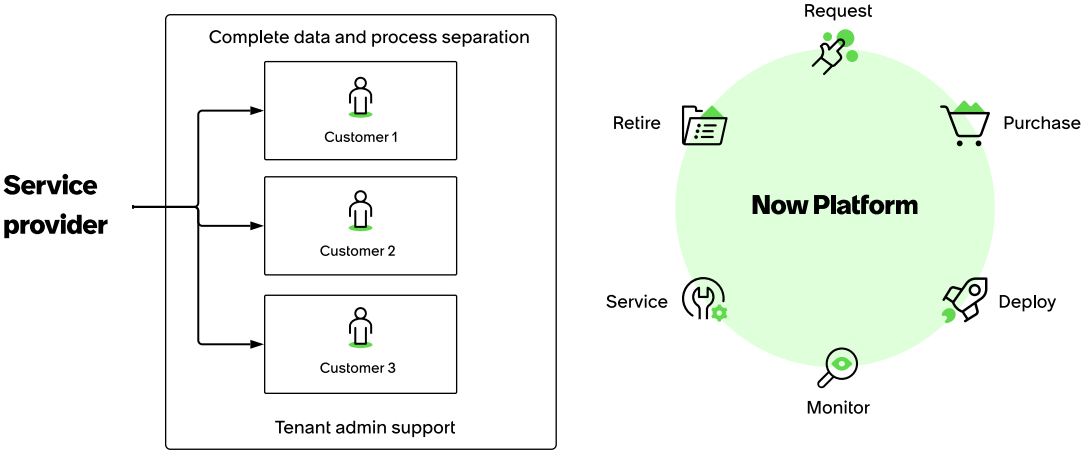
To view logs for domain separation, create a system property named *`asset.log_level`* and set its value to *`debug`*, *`trace`* or *`info`*. The level you set determines which logs appear when any scheduled job that extends the *`AssetManagementBaseJob`* scheduled job runs.

In a domain-separated instance, the content data service (CDS) should populate data in the instance with domain set as **global**.

Note:

Avoid customizing the base system domain configuration record. For more information, see Recommended practice.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Required plugins

- Domain separation extension (com.glide.domain.msp_extensions.installer)
- Performance Analytics – Domain Support (com.snc.pa.domain_support)
- Software Asset Management Professional (com.sn_samp_master)

Other supported plugins

- Service Catalog – Domain Separation (com.glideapp.servicecatalog.domain_separation)
- Procurement (com.snc.procurement)
- Cost Management (com.snc.cost_management)
- Contract Management (com.snc.contract_management)

To learn more, see Domain separation explained, Contains queries and domain access, and Importance of Default domain.

Related topics

Domain separation for service providers

Domain separation and lifecycle reports

There are certain domain separation aspects to consider when running software lifecycle reports.

Software Asset Management overview

In a domain-separated environment, the software lifecycle report is generated at the level at which the Service Provider (SP) is managing compliance for their customers' environment. Typically, the level at which reconciliation is run indicates such compliance, and the software lifecycle report is generated at the same level.

The following table shows how the reconciliation should behave. In this example:

- The SP is managing Cisco's software asset management (SAM) program at the Cisco corporate level. That means the lifecycle report must run at the Cisco corporate level.
- The SP is managing Walmart's SAM program for each Walmart division (US and Mexico). That means the lifecycle report must run at the Walmart division level.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Here is the SP hierarchy:

- Cisco Corporate
  - Cisco USA
  - Cisco Mexico
- Walmart Corporate
  - Walmart USA
  - Walmart Mexico

Domain settings (reconciliation/ normalization)	Compliance reporting	Lifecycle report level
TOP/Cisco	True	Yes
TOP/Cisco/US	False	
TOP/Cisco/Mexico	False	
TOP/Cisco/Germany	False	
TOP/Walmart	False	
TOP/Walmart/US	True	Yes
TOP/Walmart/Mexico	True	Yes

If the SP sets up software models for Cisco corporate as well as Cisco Mexico, even though their intent is to manage compliance for Cisco at the Cisco Corporate level, the lifecycle report may show duplicate lifecycle records with the same install count.

Lifecycle report

Model domain		Date		Software Model	Domain
Cisco	SQL Server 2012	2014	10	SQL Server 2012	Cisco
Cisco Mexico	SQL Server 2012	2014	10	SQL Server 2012	Cisco
Walmart USA	SQL Server 2012	2014	5		
Walmart Mexico	SQL Server 2012	2014	20		

To learn more about software lifecycles, see Create software models in Software Asset Management classic. To learn about domain separation path setup, see Domain separation setup and administration

Quick start tests for Software Asset Management

Validate that Software Asset Management still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management quick start tests require activating the Software Asset Management Professional plugin (com.snc.samp). Some quick start tests require activating the following additional plugins.

- Software Asset Management - Spend Detection (com.sn_sam_spend)
- Software Asset Management Professional for Microsoft (com.snc.samp.microsoft)
- Software Asset Management Professional for SAP (com.sn_samp_sap)
- Software Asset Management Professional for Oracle (com.snc.samp.oracle)
- Software Asset Management - SaaS License Management Integrations (sn_sam_saas_int)

Software Asset Management test suite

Test	Description	Release version
SAM - Mapping Custom PPN/ DMAP to newly published PPN and Content	Validates the replacement of a custom publisher part number (PPN) with a new Software Asset Management Content Service PPN.	San Diego
SAM - Oracle PaaS BYOL	• Validates the addition of the new Serverless Hardware [cmdb_ci_serverless_hardware] table, which stores information about PaaS devices. • Validates the license compliance of Oracle Database servers in Amazon Web Services (AWS) PaaS environments. **Note:** Requires the Software Asset Management Professional for Oracle (com.snc.samp.oracle) plugin and the CMDB CI Class Models store application.	Rome
SAM - Software Product Lifecycles records on Software Model	Validates that the Software Lifecycle tab on the Software Model form is showing records. **Note:** Requires demo data and the Software Asset Management Professional for Microsoft (com.snc.samp.microsoft) plugin.	Quebec

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management test suite (continued)

Test	Description	Release version
SAM - BYOL	• Validates the purchase date on the Software Entitlement form • Validates the addition of newly added column legacy_license on the License Metric Results [samp_license_metric_result] and License Position Report [samp_license_position_report] tables • Validates the addition of newly added columns, cloud_license_type and cloud_license _type_source in the Software Installations [cmdb_sam_sw_install] table **Note:** Requires the Software Asset Management Professional for Micorosft (com.snc.samp.microsoft) plugin.	Quebec
SAM - Validate CIS Suites	Validates reconciliation of Core Infrastructure Server (CIS) suites along with downgrade rights. **Note:** Requires demo data and the Software Asset Management Professional for Microsoft (com.snc.samp.microsoft) plugin.	Paris
SAM - PerCoreForMSCluster	Verifies the reconciliation functionality for Microsoft per core with cluster.	Paris

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management test suite (continued)

Test	Description	Release version
	Note: Requires the Software Asset Management Professional for Microsoft (com.snc.samp.microsoft) plugin.	
SAM - Validate upgrade/ downgrade during Reconciliation for Microsoft publisher	Validates upgrade and downgrade rights during reconciliation for Microsoft products. **Note:** Requires demo data and the Software Asset Management Professional for Microsoft (com.snc.samp.microsoft) plugin.	Paris
SAM - Generate demand to consolidate SaaS applications	Validates generation and submission of a demand on SaaS applications. **Note:** Requires the Software Asset Management - Spend Detection (com.sn_sam_spend) plugin and the PPM standard (com.snc.financial_planning_pmo) plugin.	Paris
SAM - Software Model and Software Entitlement checks for SAP Engines	Verifies that the Software Model and Software Entitlement forms change when the product is an SAP engine. **Note:** Requires the Software Asset Management Professional for SAP (com.sn_samp_sap) plugin.	Paris
SAM - Downgrade Rights on Software Model	Validates that the downgrade rights pushed from the content service are correctly	Orlando

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management test suite (continued)

Test	Description	Release version
	populated on the Downgrade Rights related list on the software model form.	
SAM - Multi-core pack validation on Software Entitlement	Validates the functionality of new fields for a multi-core pack on software entitlements. **Note:** Requires the Software Asset Management Professional for Microsoft (com.snc.samp.microsoft) plugin.	Orlando
SAM - Downgrade Rights on Software Entitlement	Validates that the downgrade rights pushed from the content service are correctly populated on the Downgrade Rights related list on the software entitlement form.	Orlando
SAM - Software Spend Transaction	Validates the creation of a Software Spend Transaction. **Note:** Requires the Software Asset Management - Spend Detection (com.sn_sam_spend) plugin.	Orlando
SAM - Software Model and Software Entitlement	Tests that a user can create a software model and software entitlement and validates those records.	New York
SAM - Software Installation and Discovery Model	Tests that a user can create a software installation and discovery model and validates those records.	New York
SAM - Software Entitlement Creation Using Custom PPN	Creates a custom software product, custom DMAP, custom Part Number, and software entitlement using the custom Part Number. Verifies that a software model is automatically created.	New York
SAM - Software Model Checks for SAP Named Users	Tests that the software model form changes when the	New York

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Software Asset Management test suite (continued)

Test	Description	Release version
	publisher is SAP and the product is Named Users. **Note:** Requires the Software Asset Management Professional for SAP (com.sn_samp_sap) plugin.	
SAM - Software Model Checks for SaaS	Tests that the Software Model form changes when a SaaS product is selected. **Note:** Requires the Software Asset Management - SaaS License Management (sn_sam_saas_int) plugin.	New York
SAM - Validate Fields on SaaS Software Products	Tests that the **Subscription software** and **Ignore installs** fields are present on the Software Product form. **Note:** Requires the Software Asset Management - SaaS License Management (sn_sam_saas_int) plugin.	New York

Related topics

Quick start tests

ServiceNow Otto for Software Asset Management (SAM)

Use the ServiceNow Otto for Software Asset Management (SAM) application to integrate generative AI capabilities into your daily workflow, thereby minimizing manual tasks while enhancing compliance visibility and optimization insights.

Get started with AI

The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information, see ServiceNow product tiers.

For more information on AI capabilities in Software Asset Management, see AI in Software Asset Management.

Important:

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

Troubleshoot and get help

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

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 information about legal request and/or legal matter (including related field information, comments, and work notes). 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.

Using CMDB success advisor for SAM

As a CMDB administrator, you can use the Software Asset Management (SAM) dashboard in CMDB success advisor to keep software asset data accurate and aligned with data quality guidelines.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The ServiceNow® CMDB success advisor is a scoped application that drives business outcomes for targeted business products. To learn more, see CMDB success advisor.

1. CMDB success advisor for SAM setup.

   Set up the CMDB success advisor for Software Asset Management (SAM).

2. Monitor CMDB data quality for SAM.

   Identify and address data quality issues specific to SAM in the CMDB.

3. Improve CMDB data quality for SAM.

   Use the Remediation actions panel available for a data card in the advisor dashboard for SAM to improve the overall quality of your CMDB.

Related topics

- Software Asset Management
- Access CMDB success advisor
- Supported business outcomes

CMDB success advisor for SAM setup

Use the CMDB success advisor application to configure and manage the CMDB success advisor for Software Asset Management (SAM).

Plugins and dependencies

Review the CMDB success advisor application listing in the ServiceNow Store for information about dependencies, licensing or subscription requirements, and release compatibility. CMDB success advisor for SAM requires the Software Asset Management application and a SAM entitlement.

Set up overview

1. Get started with CMDB success advisor setup for SAM.

   Set up your SAM specific advisor dashboard by selecting software products to define the SAM advisor scope.

2. Manage SAM advisor scope in CMDB success advisor.

   After completing the initial setup, you can continue to improve your CMDB data quality by adjusting the software product selection for your current SAM goals.

Related topics

- Configuring CMDB success advisor

Getting started with SAM advisor dashboard setup

Set up the SAM advisor dashboard by selecting the software products that define the SAM advisor scope.

The SAM scope defines which software products CMDB success advisor monitors for SAM data quality. The selected software products determine the scope of the SAM advisor dashboard, including the KPIs that are tracked.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles required

Role required: sam_admin or sn_cmdb_admin

Manual setup

If auto-setup did not run or the eligibility conditions were not met, configure the dashboard manually by selecting software products on the CMDB success advisor landing page.

For instructions, see Set up the SAM advisor dashboard manually.

Set up the SAM advisor dashboard manually

If the SAM advisor dashboard was not configured automatically, set it up manually by selecting the software products that define the SAM advisor scope.

Before you begin

Role required: sam_admin or sn_cmdb_admin

About this task

Selecting software products defines which software the CMDB success advisor monitors for SAM data quality. Only licensable software products that are flagged for reporting are available for selection. The selected products determine the scope of the SAM advisor dashboard, including the KPIs that are tracked.

Procedure

1. On the CMDB success advisor landing page, select **Select software products** within the SAM card.
   For more information about the CMDB success advisor landing page, see Viewing the CMDB success advisor landing page. For information about other ways to access CMDB success advisor, see Access CMDB success advisor.
2. In the Edit dashboard scope dialog box, use the **Search** field to find a software publisher or product.
   You can also select **Expand** next to a publisher to view its available software products.
3. Select software products to add to your SAM advisor scope.

Software product selection actions

Action	Result
Select **Select all** for an expanded publisher.	Adds every available software product for that publisher to your selection.
Select the check box next to an individual software product.	Adds that software product to your selection.
Select **Remove** next to a product in the selected products list.	Removes that software product from your selection.

Note: Only software products with a licensable product type that are flagged for reporting are available for selection. Publishers with no qualifying software products aren't shown. You can select up to 200 software products by default.

4. Select **Save** to build the CMDB success advisor for SAM dashboard.

Note: **Save** is disabled if you deselect all software products.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The SAM data collection begins immediately via the *CMDB Advisor - SAM Daily Data Collection* scheduled job. Your first set of dashboard metrics doesn't wait for a scheduled cycle. The SAM advisor dashboard is populated after this initial data collection completes. The scheduled job then continues running on a daily basis. Until this initial data collection completes, dashboard cards indicate that no data is available and let you refresh to check again.

Once initial data collection completes, you receive a notification indicating that insights for the software products in your SAM advisor scope are ready for review.

To update the scope after initial setup, select **Edit dashboard scope** on the SAM advisor dashboard. See Manage SAM advisor scope in CMDB success advisor.

Manage SAM advisor scope in CMDB success advisor

Manage the scope of your advisor for Software Asset Management (SAM) by editing the software products in CMDB success advisor to support your targeted SAM outcomes.

Before you begin
Role required: sam_admin or sn_cmdb_admin

About this task
Control which software products are included in the SAM advisor dashboard in CMDB success advisor. Add or remove individual software products, or select every product for a publisher at once.

Procedure
1. On the SAM advisor dashboard, select **Edit dashboard scope**.
2. Review your previously selected software products, shown as already selected in the Edit dashboard scope dialog box.

Software product selection actions

Action	Result
Select **Select all** for an expanded publisher.	Adds every available software product for that publisher to your selection.
Select the check box next to an individual software product.	Adds that software product to your selection.
Select **Remove** next to a product in the selected products list.	Removes that software product from your selection.

> **Note:** Only software products with a licensable product type that are flagged for reporting are available for selection. You can select up to 200 software products by default.

3. Select **Save** to apply the changes.

> **Note:** If you save without making any changes to the selection, no confirmation message appears.

Result
The SAM dashboard in CMDB success advisor is updated to reflect the data based on the software product selection. A confirmation message summarizes the software products added or removed. Dashboard metrics refresh once daily when the *CMDB Advisor - SAM Daily Data Collection* scheduled job runs. The scheduled job invokes the *CMDB success*

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

advisor data collection for SAM Performance Analytics job to recalculate the pre-aggregated indicators used throughout the dashboard. For more information about Performance Analytics jobs, see Collecting indicator scores. Changes to your software product selection appear in the dashboard metrics after this job's next run, not immediately. For the full list of CMDB success advisor scheduled jobs, see Components installed with CMDB success advisor.

Monitoring CMDB data quality using dashboard metrics in CMDB success advisor for SAM

The CMDB success advisor for Software Asset Management (SAM) dashboard enables CMDB administrators to identify and address data quality issues specific to software installs and their related configuration items (CIs) in the Configuration Management Database (CMDB).

Important: Charts display up to the top 10 values. Any remaining values are grouped into an **Others** category. When you select a segment or count on a chart from a CMDB success advisor dashboard, the KPI Details page opens. On the page, you can analyze how a specific metric trends over time. Additionally, the Remediation actions panel appears when remediation actions are available for that card. Use the panel to improve the quality of CMDB. To learn more, see KPI Details and Improving CMDB data quality for SAM.

If the Performance Analytics data collector exceeds its row limit during data processing, a notification banner appears on the dashboard indicating that some metrics could not be loaded. For more information, see Data collector Performance Analytics properties.

Access the dashboard

To open the dashboard, select **View insights** for SAM on the CMDB success advisor landing page. See Access CMDB success advisor.

Note: The CMDB success advisor for SAM dashboard is available only after the setup process is complete. For more information, see CMDB success advisor for SAM setup.

Required roles

Roles required for CMDB success advisor for SAM dashboard

Role	Description
sam_user	Required to view the SAM advisor dashboard in read-only mode.
sam_admin	Required to select or edit the software products included in the SAM advisor scope.
sn_cmdb_admin	Provides administrative access to view and edit the scope for any CMDB success advisor product, including SAM.
sn_cmdb_user	Provides read-only access to CMDB success advisor pages and data.
sn_cmdb_editor	Provides the same dashboard access as sn_cmdb_user, with write access on CMDB records outside the application.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

User	Dashboard use
CMDB administrator	• Gain real-time visibility into software install data quality and completeness • Identify software installs missing edition, version, or cloud license details • Detect duplicate CIs with software installs and stale CI records • Verify that virtual server installs have accurate host CI relationships to support licensing compliance • Prioritize and track data cleanup and remediation tasks for software asset data • Verify that the CMDB stays accurate to support SAM

Dashboard features

The dashboard provides clear, consolidated insights into software install data quality and CI accuracy. Use the dashboard to identify and resolve data quality issues within the CMDB through dedicated sub-tabs, filters, indicators, and visual reports.

Targeted CMDB metrics focus remediation efforts. Regularly monitor these metrics and follow suggested remediation actions to systematically improve CMDB data quality over time.

The dashboard header displays a **Last updated** timestamp reflecting the most recent completed run of the SAM data collector job.

Important: The dashboard data is filtered based on the Software publishers, Software products, CI class categories, and CI classes filters. See Filters.

Sub-tab description

Sub-tab	Description
Installs	Displays key metrics related to issues in software installation data that affect software inventory accuracy and licensing, limited to installs with a normalized product.
Installed on	Displays key metrics related to CIs on which the selected software products are installed.
Virtual CI relationships	Displays key metrics related to CI relationships that connect virtual machine installs to their host infrastructure to support licensing compliance.

Feature description

Feature	Description
CMDB data quality insights	Displays an AI-generated summary of CMDB data quality for SAM outcomes and lists the top 5 issues with guided remediation actions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Feature description (continued)

Feature	Description
generated by AI	Issues are ranked primarily by the percentage of CIs or CI classes that each issue affects, not by severity, within five categories, in this order: **Data integrity**, **CI attributes**, **Install attributes**, **Install status** (or **Life cycle stage** on instances where the CSDM Activation plugin is active), and **Virtual CI relationships**. Foundational data integrity issues, such as duplicate CIs and stale CIs, are evaluated first because they can inflate the counts behind other issues. A percentage gap of more than 15 points between issues in the same category can change their default order. A percentage gap of more than 40 points between issues in different categories can also change their default order. For the reasoning behind the ranking and recommendations, see Summarize CMDB readiness with the ServiceNow Otto skill. Select **View reasoning** to open the *Reasoning* popover, which explains the ranking and includes a **Learn more** link to the same topic. **Note:** Available only when the summarize CMDB readiness skill is configured. See Configure the summarize CMDB readiness skill. The **Software installs missing version** card and the **CIs missing CPU attributes** card each display their own **Ask Otto** action, separate from the Remediation actions panel. For more information about the Remediation actions panel, see Improving CMDB data quality for SAM. Selecting **Ask Otto** opens the ServiceNow Otto panel in a dialog box. The panel starts the CMDB ingestion optimizer agent conversation. The agent recommends Discovery patterns, Service Graph Connectors, and specialized ingestion tools for the affected software products or CI classes. The **Ask Otto** action requires the now_assist_panel_user role. Both cards also require the sam_admin role or the sn_cmdb_admin role. **Note:** If the agent conversation fails to start, an error notification appears and the **Ask Otto** action remains available to try again.

Filters

Filters enable narrowing the data shown in charts and metrics based on software publisher, software product, CI category, or CI class.

Name	Type	Description
Software publishers	List	Filters data based on the selected software publishers.
Software products	List	Filters data based on the selected software products. Narrows to the software products available for the selected publishers.
CI class categories	List	Filters data based on CI category. Only available when

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name	Type	Description
		the CMDB CI Class Models plugin (sn_data_model_nav) is active and you have read access to CI class data.
CI classes	List	Filters data based on CI class. Only available if you have read access to CI class data.

Note: Filters cascade: narrowing the Software publishers selection narrows the available Software products, CI class categories, and CI classes options.

Select **Reset filters** to clear all filter selections and restore the dashboard to its default view.

Note: You need the pa_viewer role to use the filters, including **Reset filters**.

Installs

Displays key metrics related to issues in software installation data that affect software inventory accuracy and licensing, limited to installs with a normalized product.

Note: The KPI Details trend chart for the Software installs card covers the most recent 6 months of data. The percentage change comparison on the Software installs missing edition, Software installs missing version, and Server installs missing cloud license cards also covers 6 months.

Installs sub-tab details

Card	Description	Indicators
Software installs	Total number of software installs in scope, broken down by discovery source.	Software installs
Installs by	Breakdown of software installs by software publisher (default), software product, CI class, or latest integration source. Select an option from the drop-down list to change the breakdown.	Installs by
Software installs by normalization status	Breakdown of software installs by normalization status.	Software installs by normalization status
Software installs missing edition	Software installs missing an edition value, affecting normalization and license reconciliation accuracy.	Software installs missing edition
Software installs missing version	Software installs missing a version value, affecting normalization and license reconciliation accuracy.	Software installs missing version
Server installs missing cloud license	Installs on servers with a cloud provider populated but no cloud license type, for a defined set of qualifying software products, affecting cloud license reporting accuracy.	Server installs missing cloud license

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Installed on

Displays key metrics related to CIs on which the selected software products are installed.

The **Installed on** sub-tab name reflects the **Installed on** field on the software installation record, which identifies the CI on which the software is installed. For more information, see Software installation fields.

Note: The KPI Details trend chart for the CIs not updated and Duplicate CIs cards covers the most recent 6 months of data. The percentage change comparison on the CIs missing environment, CIs missing assigned to, and Server CIs missing CPU attributes cards also covers 6 months.

Installed on sub-tab details

Card	Description	Indicators
Installs by CI install status	Breakdown of software installs by the install status, or life cycle stage, of the CI hosting the install. This card appears under a **Data summary** heading. **Note:** On instances where the CSDM Activation plugin (com.snc.cmdb.csdm.activation) is active, this card is named **Installs by life cycle stages** and installs are grouped by life cycle stage instead.	Installs by CI install status
CIs missing environment	CIs with a software install that are missing an environment value, leading to incomplete asset context.	CIs missing environment
CIs missing assigned to	CIs with a software install that aren't assigned to a specific user, leading to unclear ownership.	CIs missing assigned to
Server CIs missing CPU attributes	CIs with a software install that are missing key CPU attributes needed for accurate license calculations.	Server CIs missing CPU attributes
CIs not updated	CIs with a software install that have not been updated within a selectable time period, causing data gaps and inaccuracies. Select 30, 60, or 90 days from the drop-down list to change the threshold.	CIs not updated in the last 30 days CIs not updated in the last 60 days CIs not updated in the last 90 days
Duplicate CIs	Software installs on CIs identified as duplicates, with an active de-duplication task, causing data redundancy.	Duplicate CIs

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Virtual CI relationships

Displays key metrics related to CI relationships that connect virtual machine installs to their host infrastructure. Accurate mappings enable licensing compliance.

Note: Run the *CMDB Health Dashboard - Relationship Compliance Processor* scheduled job to populate virtual machine host relationship data. If the job is inactive, the dashboard displays a `Relationship data incomplete` alert with a **Run job** action. The dashboard metrics update after the *CMDB Advisor - SAM Daily Data Collection* scheduled job runs. For more information, see Components installed with CMDB success advisor and Scheduled jobs.

Note: The KPI Details trend chart for the Virtual CIs with incorrect host CI relationships card covers the most recent 6 months of data.

Virtual CI relationships sub-tab details

Card	Description	Indicators
Virtual machines without host CI relationships	Software installs on Windows Server or Linux Server virtual CIs that don't have a host server CI relationship. The check is limited to VMware ESX Server and Microsoft Hyper-V virtual infrastructure, leading to gaps in licensing compliance tracking.	Virtual machines without host CI relationships
Virtual CIs with incorrect host CI relationships	Virtualized by or Member of relationships for virtual server CIs, limited to VMware ESX Server and Microsoft Hyper-V virtual infrastructure. Relationship health analysis flags these relationships as incorrect or suggested for removal. On the KPI Details page, this indicator appears under the heading Incorrect infrastructure relationships.	Virtual CIs with incorrect host CI relationships
Virtual CIs on hosts with incorrect cluster relationships	Software installs on virtual server CIs whose host server has a cluster relationship with the wrong relationship type, broken down by virtualization technology. Covers VMware ESX Server, Microsoft Hyper-V, and Nutanix virtualization. **Note:** This card doesn't depend on the *CMDB Health Dashboard - Relationship Compliance Processor* scheduled job used by other cards in this section. The *CMDB Advisor - SAM Daily Data Collection* scheduled job populates it directly.	Virtual CIs on hosts with incorrect cluster relationships
Virtual server CI and host CI install status distribution	Comparison of the install status, or life cycle stage, between a virtual server install and its related host CI.	Install status distribution matched Install status distribution mismatched

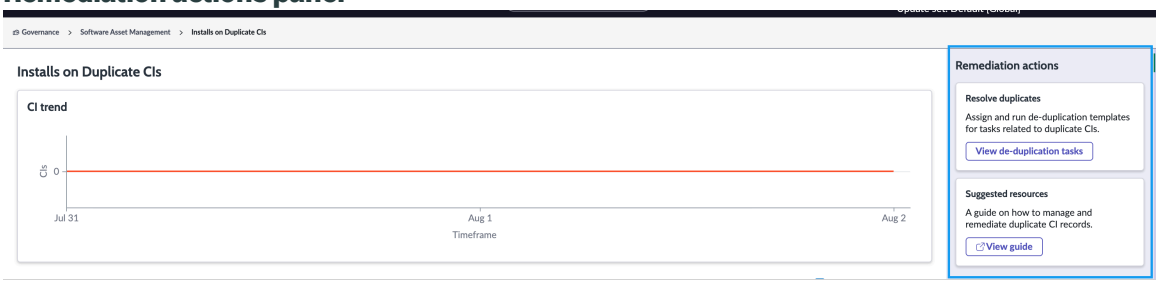
Improving CMDB data quality for SAM

The Remediation actions panel available for a chart in the CMDB success advisor dashboard for Software Asset Management (SAM) suggests targeted actions to improve the overall quality of your Configuration Management Database (CMDB). The CMDB data quality insights generated

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

by AI section on the same dashboard also includes an Ask Otto action on some cards. Selecting it starts an agent conversation without waiting for the next scheduled agent run.

Remediation actions panel



When remediation actions are available for a chart, the Remediation actions panel appears on the KPI Details page.

You can perform the actions suggested within the Remediation actions panel to address SAM data quality issues in the CMDB. These actions help improve the accuracy, consistency, and usability of configuration items (CIs), promoting better alignment with SAM.

The Remediation actions panel:

- Improves CMDB data quality through guided actions
- Suggests context-aware actions
- Supports quick, informed remediation steps
- Focuses attention on meaningful tasks
- Appears only when actionable insights are available

Accessing the Remediation actions panel

To open the Remediation actions panel, select a segment or count on a chart in the CMDB success advisor dashboard for SAM. The KPI Details page opens. If remediation actions are available for the selected data, the panel appears on the details page suggesting various remediation actions.

Available remediation actions

The Remediation actions panel provides relevant suggestions and actions based on the information in the selected chart.

The remediation actions are available for the improvement of the following issues:

Stale CIs

Selecting a segment on the **CIs not updated** chart displays a suggestion to review the retire policies for the CI classes associated with the listed CIs. Reviewing these policies enables you to maintain an accurate representation of your software asset environment.

Duplicate CIs

Selecting a segment on the **Installs on Duplicate CIs** chart displays a suggestion to review the active de-duplication tasks for the affected CIs. Reviewing these tasks enables you to avoid data fragmentation and promote a single source of truth for software install data.

The **Software installs missing version** card and the **CIs missing CPU attributes** card in the **CMDB data quality insights generated by AI** section each display their own **Ask Otto** action,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

separate from this panel. For more information, see Monitoring CMDB data quality using dashboard metrics in CMDB success advisor for SAM.

Indicators used in the CMDB success advisor for SAM dashboard

Indicators enable viewing of high-level metrics that highlight data quality, completeness, and licensing compliance issues across software installs and their related configuration items (CIs).

CMDB success advisor for SAM dashboard indicators

Software installs

Total number of software installs from the Software Install [cmdb_sam_sw_install] table that are in the selected scope and associated with a normalized software product, grouped by discovery source.

Installs by

Software installs from the Software Install [cmdb_sam_sw_install] table, grouped by a selectable dimension. Options include software publisher (default), normalized software product, the CI class of the CI hosting the install, or discovery source.

Software installs by normalization status

Software installs from the Software Install [cmdb_sam_sw_install] table, grouped by normalized software product and the CI class of the CI hosting the install. Installs are further grouped by the normalization status recorded on the associated Software Discovery Model.

Software installs missing edition

Total number of software installs from the Software Install [cmdb_sam_sw_install] table where the associated Software Discovery Model doesn't have an edition value populated.

Software installs missing version

Total number of software installs from the Software Install [cmdb_sam_sw_install] table where the associated Software Discovery Model doesn't have a version value populated.

Server installs missing cloud license

Total number of software installs on CIs where a cloud provider is populated and a cloud license type isn't populated. The count is limited to a defined set of qualifying software products that require cloud license tracking.

Installs by CI install status

Software installs from the Software Install [cmdb_sam_sw_install] table, grouped by the install status of the CI hosting the install. On instances where the CSDM Activation plugin (com.snc.cmdb.csdm.activation) is active, this card is named **Installs by life cycle stages**, and installs are grouped by life cycle stage instead.

CIs missing environment

Total number of CIs with a software install in the selected scope that don't have an environment value populated.

CIs missing assigned to

Total number of CIs with a software install in the selected scope that aren't assigned to a specific user.

Server CIs missing CPU attributes

Total number of CIs with a software install in the selected scope that are missing key CPU attributes needed for accurate license calculations.

CIs not updated in the last 30 days

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Total number of CIs with a software install in the selected scope that haven't been updated in the last 30 days.

CIs not updated in the last 60 days

Total number of CIs with a software install in the selected scope that haven't been updated in the last 60 days.

CIs not updated in the last 90 days

Total number of CIs with a software install in the selected scope that haven't been updated in the last 90 days.

Duplicate CIs

Total number of software installs on CIs identified as duplicates, where the CI has an active follow-on de-duplication task in the Reconcile Duplicate Task [reconcile_duplicate_task] table. Counts are limited to installs of selected software products.

Virtual machines without host CI relationships

Total number of software installs on Windows Server or Linux Server virtual CIs missing a Virtualized by::Virtualizes relationship to a host CI, scoped to selected SAM products. The check is limited to VMware ESX Server and Microsoft Hyper-V virtual infrastructure. Missing relationships can create gaps in licensing compliance tracking.

Virtual CIs with incorrect host CI relationships

Total number of Virtualized by or Member of relationships for virtual server CIs, limited to VMware ESX Server and Microsoft Hyper-V virtual infrastructure. Relationship health analysis flags these relationships as incorrect or suggested for removal. On the KPI Details page, this indicator appears under the heading Incorrect infrastructure relationships.

Virtual CIs on hosts with incorrect cluster relationships

Total number of software installs, scoped to the selected SAM products, on virtual server CIs whose host server has a Member of relationship to a cluster CI. The relationship uses the wrong type for that valid child and parent class pair. Covers three virtualization technologies: VMware ESX Server, Microsoft Hyper-V, and Nutanix virtualization. A *`CMDB Advisor - SAM Daily Data Collection`* scheduled job populates this indicator. It doesn't depend on the *`CMDB Health Dashboard - Relationship Compliance Processor`* job used by other indicators in this section.

Install status distribution matched

Virtual server software installs where the install status, or life cycle stage, of the virtual server CI matches that of its related host CI.

Install status distribution mismatched

Virtual server software installs where the install status, or life cycle stage, of the virtual server CI doesn't match that of its related host CI.

Note: Relationship-based indicators require the *`CMDB Health Dashboard - Relationship Compliance Processor`* scheduled job to have run. If the job is inactive, the dashboard displays a message indicating that relationship data is incomplete, with an option to run the job. Metrics in the Virtual CI relationships section may be incomplete as a result.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware Asset Management

The ServiceNow® Hardware Asset Management (HAM) application is a licensable application that on activation provides advanced workflow, automation, and mobile capabilities to maintain your assets.

Watch this short video for an introduction to the Hardware Asset Management application.

https://player.vimeo.com/video/995199429?badge=0&autopause=0&player_id=0&app_id=58479

Note: Beginning with the ServiceNow AI Platform® Washington DC release, limited support is provided for the Hardware Asset Management Core UI interface. While it remains active in your instance, including when you upgrade to a new ServiceNow AI Platform release, the best approach is moving to the new workspace experience. For more information, see KB1584544, Hardware Asset Workspace and Next Experience UI.

Explore



Learn the key features and business value that the Hardware Asset Management application offers.

Configure



Activate Hardware Asset Management supporting plugins and assign roles.

Use



Use the Hardware Asset Management to efficiently manage your hardware assets.

Reference



Improve your business processes and practices by visualizing actionable data.

Hardware Asset Management integrations



Connect Hardware Asset Management with ServiceNow applications and external systems to extend your asset management capabilities.

ServiceNow Otto for Hardware Asset Management



Use the ServiceNow Otto for Hardware Asset Management (HAM) application to streamline and automate hardware asset requests and repairs using agentic workflows.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Device as a Service (DaaS)  Use the Device as a Service (DaaS) feature to provide assets and asset management services to customers of DaaS providers via a subscription model.		

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Learn

What is Hardware Asset Management?

Exploring Hardware Asset Management

Learn more about Hardware Asset Management by reviewing the benefits that it can provide for different users in your organization.

Hardware Asset Management overview

Hardware Asset Management enables you to track and manage the end-to-end life-cycle of all your organizational assets such as hardware and consumables. You can simplify every stage of the asset life-cycle with prescriptive workflows and tasks. Asset tagging, assigning ownership, and location tracking of the asset mitigate the risk of asset loss. Hardware Asset Management can also identify unapproved hardware assets and ensure compliance with established policies and regulations of your organization.

Hardware Asset Management benefits

Benefit	Feature	Users
Manage your asset life-cycle and keep the asset records accurate and up-to-date through an intuitive, centralized, and single-pane view of the hardware asset estate that directs you to critical Hardware Asset Management priorities and activities.	Hardware Asset Workspace	Executives/ Application owners/ Asset managers/ Inventory users
Leverage mobile devices to receive assets into stockrooms and conduct on-site audits for accurate inventory checks.	Mobile asset scanning	Asset managers/ Asset administrators/ Inventory administrators

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Benefit	Feature	Users
Streamline your asset life-cycle with pre-built and guided workflows of Hardware Asset Management.	Asset life-cycle automation	Asset managers/ Asset administrators
Automate Return Merchandise Automation (RMA) processes for assets to be returned, replaced, or repaired.	Return Merchandise Authorization	Asset managers/ Inventory administrators
Manage a complex group of assets as a single parent record.	Asset bundles	Asset managers/ Asset administrators
Automate the process of reclaiming assets assigned to a departing employee.	Asset reclamation	Employees/Asset managers/Inventory administrators
Manage asset donation to charity organizations with workflow.	Asset donation	Employees/Asset managers/Inventory managers
Operate stockrooms with greater precision by linking assets to pallets and tracking assets at the aisle and space level.	Pallets for inventory	Asset managers/ Inventory administrators
Handle all loaner asset requests and make sure of the timely preparation and deployment of loaner assets.	Loaner assets	Employees/Inventory administrators
Automate the ordering, asset tagging, and delivery of your employees' hardware asset refresh requests.	Zero Touch Refresh	Employees/Asset managers/Inventory administrators
Track shipments by creating connections to carriers via APIs.	Shipment carrier integration	Administrators/Asset managers/ Inventory administrators
Automate and create hardware asset records before they are received.	Advanced Shipment Notification (ASN)	Administrators
Request hardware products to be used in the organization, onboard the product, and define the TRM life-cycle phases.	Manage onboarding of hardware products using Application Portfolio Management	Enterprise architects/ Application owners
Get defective hardware assets in a stockroom repaired quickly using the Repair flow.	Repair flow	Asset managers
Locate and pick the assets in your stockroom efficiently by using the ServiceNow Mobile Agent application.	Inventory picking for Hardware Asset Management	Inventory users
Track asset movement from the receiving bay of the inventory to the designated space within the stockroom using the Asset put away task.	Managing inventory by putting away assets in the stockroom drop-off location	Inventory users
Enable hardware asset requests to be fulfilled with minimal intervention.	Zero Touch request flow	Employees/ External providers/ Catalog administrators

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Benefit	Feature	Users
Perform remote asset audits for the required hardware assets irrespective of their locations by using Asset Attestation.	Asset Attestation	Asset managers/ Inventory users/ Employees
Receive hardware and consumable assets at stockrooms from any workflow at a centralized location	Receiving hardware and consumable assets at stockrooms	Asset managers/ Inventory users
Assess how effectively and efficiently assets fulfill their intended functions within your organization using the Asset performance reports.	Asset performance reports	Asset managers
Track and manage stockrooms efficiently by evaluating the inventory reports.	Inventory reports	Inventory users

Using Guided Setup to implement Hardware Asset Management

Hardware Asset Management Guided Setup provides a sequence of tasks that help you configure Hardware Asset Management on your ServiceNow instance. To open Hardware Asset Management guided setup, navigate to **App** > **Guided Setup**. For more information about using the Guided Setup interface, see Using guided setup.

AI in Hardware Asset Management

Set up, manage, and optimize your generative AI solutions on the ServiceNow AI Platform® from a single workspace.

The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

For more information, see ServiceNow product tiers.

Overview of AI capabilities

The agentic workflows operate in a structured manner.

- The agentic workflow first verifies licenses and models, then checks stock availability, and finally triggers the necessary AI agents to fulfill hardware asset requests automatically.
- The AI agents also verify the repair tasks, provide detailed evaluation guide and repair steps, and close the tasks after receiving user confirmation.

Benefits of agentic workflows

The collection of AI agents offers the following benefits:

- Automation of repetitive and complex tasks involved in sourcing hardware assets, reducing the workload on asset managers.
- Reduced need for human involvement in tasks, enabling asset managers to focus on activities of higher priority.
- Faster resolution of hardware asset requests and repair requests, leading to quicker turnaround times.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Increased employee satisfaction, with quicker resolution of asset requests and repair requests.
- Improved asset utilization, for effective allocation of hardware assets.

For more information about AI capabilities in Hardware Asset Management, see the following:

- Fulfill hardware asset requests by using the Help manage hardware asset requests agentic workflow
- Fulfill repair orders by using the Help repair hardware assets agentic workflow
- Analyze hardware assets using the Generate hardware asset insights generative AI skill

For information about AI assets that are available on the ServiceNow AI Platform, see the following topics:

- Generative AI skills
- Agentic workflows

Supporting information for ServiceNow Otto for Hardware Asset Management (HAM)

Get a quick overview of the important information related to the ServiceNow Otto for Hardware Asset Management (HAM) application.

Supported versions

The ServiceNow Otto for HAM application is supported starting with the Yokohama Patch 4 release.

Supported user interfaces

You can access the agentic workflow included in the ServiceNow Otto for HAM application through the ServiceNow Otto panel in the Hardware Asset Workspace.

Application information

Activate the ServiceNow Otto for Hardware Asset Management (HAM) store application (sn_now_assist_ham) to use the agentic workflow.

This store application has the following dependencies:

- Hardware Asset Management (com.sn_hamp)
- ServiceNow Otto for Platform (com.sn_genai_platform)
- AI Agents for IT Asset Management (com.sn_itam_aia)

Activate the applications in the following order:

- Hardware Asset Management (com.sn_hamp)
- ServiceNow Otto for Platform (com.sn_genai_platform)
- AI Agents for IT Asset Management (com.sn_itam_aia)
- ServiceNow Otto for Hardware Asset Management (HAM) (sn_now_assist_ham)

Using agentic workflows in ServiceNow Otto for HAM

Use the ServiceNow Otto for HAM AI agent collection to complete hardware asset sourcing tasks autonomously and optimize the asset repair workflow. These AI agents help resolve hardware requests quickly, improve the productivity of asset managers, and speed up repairs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Available agentic workflows for ServiceNow Otto for Hardware Asset Management (HAM) AI agent collection

Agentic workflow name	Description	Available AI agents	Introduced inServiceNow Otto for HAM version
Help manage hardware asset requests	Automatically fulfills hardware asset requests by either using the available local stock, or by generating transfer orders to move assets from other stockrooms, or purchase orders to acquire assets from vendors.	• Hardware asset management sourcing AI agent • Transfer order creation AI agent • Purchase order creation AI agent	ServiceNow Otto for Hardware Asset Management (HAM) v1.0
Help repair hardware assets	Automates and optimizes the repair workflow for hardware assets by validating repair tasks, guiding inventory users and technicians through troubleshooting steps, suggesting suitable repair actions, and closing relevant tasks with details.	• Asset next best action AI agent • Evaluate asset AI agent • Repair asset AI agent	ServiceNow Otto for Hardware Asset Management (HAM) v2.0

Important: If the agentic workflows and AI agent records are inactive, follow the steps below to activate them

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

By default, all agentic workflows and AI agent records are read-only. To customize them, you must first duplicate the agentic workflow, and then activate the duplicated workflow.

After you duplicate the agentic workflow, you can test it in the AI Agent Studio to analyze its performance as it executes the instructions that you have defined. For details on testing your agentic workflow, see Manually test the execution of an agentic workflow.

You can implement security in AI agents and the agentic workflow using Access Control Lists (ACLs) that specify which users can discover and invoke an agentic workflow or an AI agent. For more details on configuring ACLs, see Implement access control in AI agents.

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Using generative AI skills for ServiceNow Otto for Hardware Asset Management (HAM)

Streamline asset management tasks in the Hardware Asset Workspace by using the generative AI skills available in the ServiceNow Otto for HAM application.

Available generative AI skills for ServiceNow Otto for Hardware Asset Management (HAM)

Generative AI skill name	Description	Introduced inServiceNow Otto for HAM version
Generate hardware asset insights	Generates comprehensive asset summaries and actionable recommendations for the asset.	ServiceNow Otto for Hardware Asset Management (HAM) v4.0

Hardware Asset Management subscription

The ServiceNow platform uses a licensing method where your organization is charged for using the IT Asset Management application- ServiceNow Hardware Asset Management.

Note: You must install Hardware Asset Management from ServiceNow Store to help you automate tasks and simplify work.

Get the most out of your asset data to save time and resources with the following prescriptive workflows or features.

- Hardware Asset Management on Product Hub
- Configuration Console for Hardware Asset Management
- Hardware Asset Workspace
- Hardware Asset dashboard
- Hardware Model Normalization
- Content lookup portal
- Asset life-cycle automation
  - Hardware asset refresh
  - Hardware disposal
  - Loaner asset order or asset reservations
  - Return Merchandise Authorization
  - Asset lease expiration
  - Leased asset return
  - Asset bundles
  - Advanced shipment notifications (ASN)
  - Asset donation
  - Zero Touch Refresh
- Automated asset tasks such as deploy, swap, and retire
- Mobile
  - Asset inventory audit
  - Asset repair task

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

  - Asset pick task
  - Asset put away task
- Asset integration - Shipping carrier
- Pallet assets
- Asset Management Executive Dashboard
- Contract management and renewal
- Hardware Asset dashboard
- Content lookup portal
- HAM Guided Setup
- Zebra RFID integration
- Service locations
- Distribution channels support for Stockroom
- Indoor Mapping capability for Hardware Asset
- Hardware Asset Management Maturity
- Asset Total Cost of Ownership
- Asset Warranty integration with Lenovo
- Repair flow
- Inventory picking
- Zero Touch request flow
- Asset Attestation
- Put away assets in the stockroom drop-off location
- Receiving hardware and consumable assets at stockrooms
- Asset performance reports in the Hardware Asset Workspace
- Inventory reports for managing stockrooms in the Hardware Asset Workspace
- Approximated lifecycle and lifecycle code

The following base system features of Core Asset Management are provided with ServiceNow IT Service Management (ITSM) and Customer Service Management (CSM) product.

- Asset and model records
- Stockrooms
- Transfer orders
- Purchase orders
- Contracts
- Mobile asset receiving
- Mobile - My Assets

For more information, see Base Asset Management and Manage Hardware Asset Management subscriptions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware Asset Management licensing

Hardware Asset Management (HAM) licensing enables you to choose the Hardware Asset Management resource categories that you want to use. You can save money by paying only for those categories that you use, and not for categories that you don't use.

Only the resource categories that are opted in are counted toward the Subscription Units.

Note: By default for a particular resource category, the normalization functions for its associated models and the asset actions for its associated assets don't work. If you want to use the normalization functions and asset actions, you have to opt in that resource category.

For more information about opting in or out of the HAM license resource categories, see Opt-in or opt-out of HAM license resource categories.

Important:

Every physical asset record in the Asset [alm_asset] table counts toward your subscription total if it meets the following criteria:

- It belongs to a resource category your organization has opted in to for HAM licensing.
- It is in an active state (not Disposed or Retired).

Assignment to a user is not required — an unassigned asset that meets these criteria counts the same as an assigned asset.

HAM licensing has no dependency on CMDB CI classes or CI records.

Based on the usage of model categories, the ServiceNow HAM license is divided into resource categories. There are different types of resource categories. Different assets fall under different categories as well. Make sure you opt in the correct and required categories. An asset represented in the Asset [alm_asset] table and which meets the criteria for each managed IT resource type such as Server, End User Computers, Network Gear, and Mobile Device, is counted toward a Subscription Unit based on the predefined ratio of number of assets to subscription units.

Note: Resource categories in HAM are associated with certain entitlements. For example, the Computer resource category is shown only if the computer entitlement is available in the HAM license. On an on-premise ServiceNow instance, the entitlements aren't downloaded. However, you can store your HAM entitlement details by using the *sn_ham_active_entitlements* system property. You can update this system property with a comma separated list of entitlements for which you have access.

The comma separated entitlements should be updated in the following format:

- End User Computers- ham_computer_license
- Mobile Device- ham_mobiledevice_license
- Servers- ham_server_license
- Network Gear- ham_networkgear_license
- Monitors- ham_monitor_license
- Storage- ham_storage_license
- Printer- ham_printer_license
- Telecom Network Inventory- ham_tni_license

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HAM license resource categories

The Subscription unit ratio is the ratio of the number of assets to the number of subscription units. For example, the subscription unit ratio of End User Computers is 4:1, where 4 assets require a single unit of license. If 1 license costs $100, then 4 computer assets cost $100 and 8 computer assets cost $200.

Resource category	Subscription unit ratio	Model category
End User Computers	4:1	Computer
Servers	1:1	Any server such as the following: • AIX Server • ESX Server • HPUX Server • Linux server • Netware Server • OS/X Server • Server • Solaris Server • Unix Server • Windows Server
Network Gear	5:1	• Network gear • IP Switch • IP Router
Mobile Device	10:1	Mobile Device
Telecom Network Inventory	1:1	• Card • Network Interface • Logical connection • Physical connection • Telco equipment
Unclassified hardware	1:1	Hardware
Monitors	15:1	Monitor
Storage	3:1	Storage Device
Printers	10:1	Printer

Note: Unclassified hardware, Monitors, Storage, and Printers are available with Hardware Asset Management version 10.1.0 and later only when you upgrade to HAM license version 5.0.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To access Hardware Asset Management features for Telecommunications Network Inventory, you should install the Telecommunications Network Inventory application and opt-in to the Telecom Network Inventory resource category. For more information, see Telecommunications Network Inventory integration with Hardware Asset Management.

HAM Licensing for custom model categories

HAM provides some model categories out-of-the-box. Any model category that you create is considered as custom model category. When you upgrade to the Hardware Asset Management license released in Washington DC and later releases, any asset with a custom model category can access the Hardware Asset Management features and workflows only if any of the following conditions hold good:

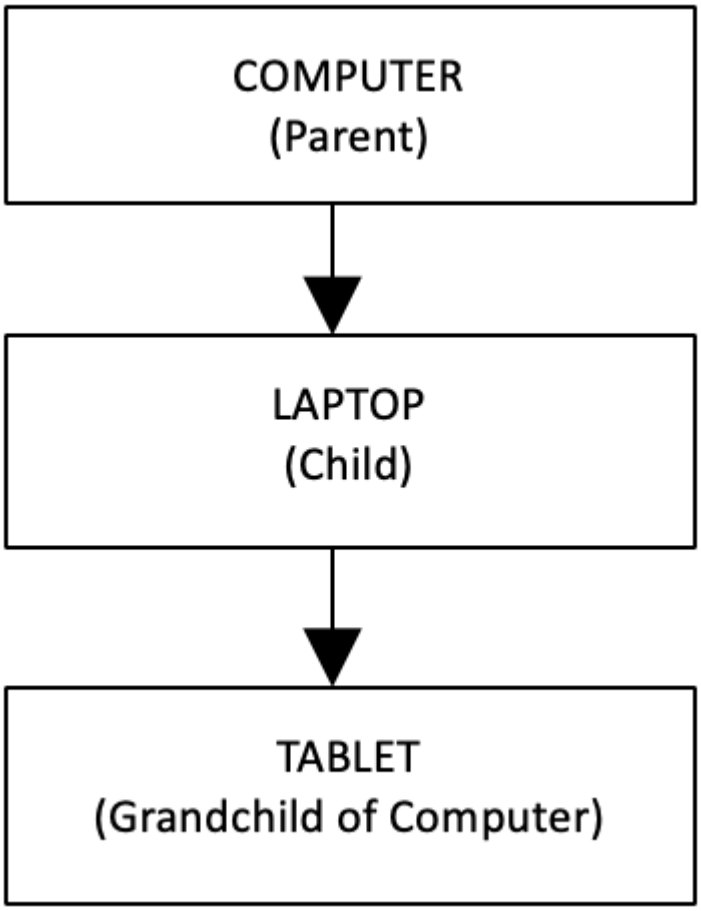
- The custom model category of the asset belongs to the hierarchy of opted-in model categories.
- The parent model category of a custom model category is associated with a licensable and opted-in resource category.

Note: If you are on any HAM license version released before Hardware Asset Management license version 4, by default, the assets with custom model categories can access Hardware Asset Management features and workflows even if they aren't associated with an opted-in and licensable resource category. Also, the custom model categories aren't counted toward a Subscription Unit.

You can enable HAM licensing for custom model categories by using the *sn_hamp.enable_custom_category_licensing* system property. By default, the value of this system property is set to **false**. When you set the *sn_hamp.enable_custom_category_licensing* system property to **true**, custom model category assets are excluded from HAM workflows unless the parent of the custom model category is an opted-in and licensable category.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Example for hierarchy of model categories



In the example, the Computer model category is associated with the custom model categories Laptop and Tablet. Note the following about the custom model categories:

- When you opt in Computers, both Laptop and Tablet are also counted toward a Subscription Unit under the End User Computers resource category. Also, these custom model categories can access Hardware Asset Management features and workflows.
- When you opt out Computers, both Laptop and Tablet are also opted-out and these custom model categories can’t access Hardware Asset Management features and workflows.

Note: A model category that belongs to a licensable resource category and has a parent model category is licensed only under its associated resource category. For example, the Monitor model category that's associated with the licensable Monitors resource category and that has Computer as its parent, is licensed only under Monitors.

Assets with the following model categories are excluded from accessing Hardware Asset Management features and workflows:

- Any model category that is a child of an opted-out resource category.
- Any model category that is a child of model categories such as printer and storage device. This exclusion is only in Hardware Asset Management version 10.0.0.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: In Hardware Asset Management version 10.0.0 and earlier, assets with model categories such as Printer, Consumables, and Storage Device retain access to Hardware Asset Management features without opting in a resource category.

From Hardware Asset Management version 10.1.0 onward, the resource categories like Printers, Monitors, Storage, and Unclassified hardware are licensed and available only when you upgrade to HAM license version 5.0. You must opt in these resource categories to access the Hardware Asset Management features. When you opt in these resource categories, all their child model categories can also access the HAM features and workflows.

After you upgrade to HAM license version 5.0, the printers, monitors, storage devices, and Unclassified hardware assets that were created in the earlier versions wouldn't be able to access the Hardware Asset Management features by default. You should explicitly opt in these resource categories.

- Any other custom model category without a parent category.

Licensing framework for Hardware Asset Management solutions

Manage the subscription units purchased and consumed by your organization for all the Hardware Asset Management solutions with the improved HAM licensing framework. When more than one Hardware Asset Management solution is activated on a ServiceNow instance, any licensable and opted-in resource category is licensed only under one solution.

The licensed solutions like Hardware Asset Management integration with Zero Touch Mobility and Hardware Asset Management integration with Telecommunications Network Inventory install the Hardware Asset Management on your ServiceNow instance.

Each Hardware Asset Management solution supports some default resource categories that can avail Hardware Asset Management features and workflows.

Resource categories for Hardware Asset Management solutions

Application/Solution	Supported resource categories
Hardware Asset Management integration with Zero Touch Mobility	Mobile Device
Hardware Asset Management integration with Telecommunications Network Inventory	• Telecom Network Inventory • Server • Network Gear
Hardware Asset Management	• End User Computers • Mobile Device • Server • Network Gear • Printers • Monitors

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Resource categories for Hardware Asset Management solutions (continued)

Application/Solution	Supported resource categories
	• Storage • Unclassified hardware

HAM licensing is based on the subscription unit ratio defined for each resource category. You can opt in and pay for only those resource categories that you want to use. For more information, see Hardware Asset Management licensing.

License prioritization for Hardware Asset Management solutions

Important: The HAM license prioritization feature is available with Hardware Asset Management version 10.1.0 and later.

When you activate all the Hardware Asset Management solutions on your ServiceNow instance and opt-in all resource categories, consider the following:

- A resource category is licensed only under one application based on the application priority that is defined in the HAM licensing framework.
- The application priority is set based on the licensing cost and is in the following order:
  1. Hardware Asset Management integration with Zero Touch Mobility
  2. Hardware Asset Management integration with Telecommunications Network Inventory
  3. Hardware Asset Management
- Mobile Device is licensed under Hardware Asset Management integration with Zero Touch Mobility.
- Telecom Network Inventory, Servers, and Network Gear are licensed under Hardware Asset Management integration with Telecommunications Network Inventory.
- End User Computers is licensed under Hardware Asset Management.

Licensing model for HAM solutions

Resource category	Subscription Unit Ratio	HAM integration with Zero Touch Mobility	HAM integration with Telecommunications Network Inventory	Hardware Asset Management	Licensed under
Mobile	10:1	Installed	Resource category isn't available	Installed	Zero touch Mobility
Server	1:1	Resource category isn't available	Installed	Installed	Telecommunications Network Inventory
Network gear	5:1	Resource category	Installed	Installed	Telecommunications Network Inventory

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Licensing model for HAM solutions (continued)

Resource category	Subscription Unit Ratio	HAM integration with Zero Touch Mobility	HAM integration with Telecommunications Network Inventory	Hardware Asset Management	Licensed under
		isn't available			
Telecom Network Inventory	1:1	Resource category isn't available	Installed	Installed	Telecommunications Network Inventory
End User Computers	4:1	Resource category isn't available	Resource category isn't available	Installed	Hardware Asset Management

You can view the subscription details of your Hardware Asset Management application and solutions using the ITAM License Report. For more details, see View the license report for the Hardware Asset Management application.

Exclusion of Operational Technology (OT) hardware assets from HAM licensing

The licensing model of the OT Asset Management (OTAM) application supports a few default hardware resource categories to license OT hardware assets. For more details on OT hardware assets, see OT Asset Workspace. These OTAM hardware resource categories have equivalent HAM licensing resource categories.

Comparison of resource categories

HAM resource category	Equivalent OTAM hardware resource category
Servers	OT Servers
Network Gear	OT Network Gear
Storage	OT Storage
End User Computers	OT End User Computers
Mobile Devices	OT Mobile Devices
Monitors	OT Monitors
Printers	OT Printers
Unclassified hardware	OT Unclassified Hardware

When you activate all the Hardware Asset Management solutions along with the OT Asset Management application, and opt-in HAM resource categories, consider the following points:

- Non-OT hardware assets, with the **OT entity** flag set to **false**, are licensed only under the resource categories of HAM licensing.
- OT hardware assets, with the **OT entity** flag set to **true**, are licensed only under the hardware resource categories of the OT Asset Management application. For details, see OT Asset Management licensing.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- HAM workflows support both OT hardware assets and non-OT hardware assets.
- OT Asset Management workflows support only OT hardware assets.

Related topics

Hardware Asset Management integration with Zero Touch Mobility

Telecommunications Network Inventory integration with Hardware Asset Management

Hardware Asset Management license exclusion

Pay only for the assets using licensed Hardware Asset Management features and exclude an asset for which you don't want to use the licensed features.

Hardware asset features are restricted to hardware and consumable asset records. Use the asset level exclusion when you want to use Hardware Asset Management licensed features but want to exclude a few assets. For more information about excluding an asset, see Exclude assets.

Hardware assets belonging to a category that you don't opt in are excluded by default. For example, if you don't opt in for the End User Computer category, all End user computers would be excluded. For more information, see Opt-in or opt-out of HAM license resource categories.

You can't select and use the excluded assets in the following HAM flows and tasks:

- Loaner
- Disposal
- Refresh
- Lease
- Bundle
- Return Merchandise Authorization (RMA)
- Audit
- RFID
- Asset lifecycle automation
- Pallets
- Donation

Note: Any workflow once started on an asset is allowed to complete even if the asset is marked excluded midway through.

Hardware Asset Workspace

The Hardware Asset Workspace is the intuitive and streamlined user interface of the Hardware Asset Management application to manage your hardware assets.

Note:

You must activate the Asset Management Workspace (sn_itam_workspace) plugin along with the Hardware Asset Management (sn_hamp) to use the Hardware Asset Workspace.

The Hardware Asset Workspace is a unified medium with multiple views that help you manage your assets efficiently. The views provide you with visibility into all the important aspects of your assets, such as dashboards on Normalization and Stockroom, Asset count by model, life cycle state, model category, and overall performance of assets.

The Hardware Asset Workspace contains the following views:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Hardware asset overview: View important actions and quick links to active tasks. Also, get a 360-degree view of the asset estate for a snapshot of assets by model type, life cycle state, and asset value.
- Asset analytics: Manage resources efficiently by tracking the Total Cost of Ownership (TCO) of assets.
- DaaS provider view: Manage the assets of the customers of Device as a Service (DaaS) providers.

  Note: Hardware Asset Management for Device as a Service (com.sn_daas_ham) must be installed to access this view.

- Inventory: View details of the entire asset inventory and stockrooms that enable you to perform inventory tasks.
- Asset estate: View the asset functions and maintain accurate hardware and consumable records.
- Model management: View details of different types of models being managed across hardware, software, consumables, and bundles.
- Content lookup portal for Hardware Asset Management: View data related to hardware products stored in the Hardware Asset Management Content Service.
- Procurement view: View and manage details of all ongoing procurement activities.
- Contract management: View and manage all hardware and software contracts.
- Success portal: Track the progress of your Hardware Asset Management (HAM) application with success goals, assign activities to track the success of your goals, and mature your HAM program with predefined maturity items.
- Asset operations: View asset operations related to inventory, shipment, procurement, hardware asset normalization, contracts, Zero Touch Refresh, and Success goals.

Hardware asset overview

Enhance your Hardware Asset Management experience by using the modernized and user-friendly Hardware asset overview view. The Hardware asset overview is a simplified and intuitive environment that helps you use the application more effectively by reducing complexity.

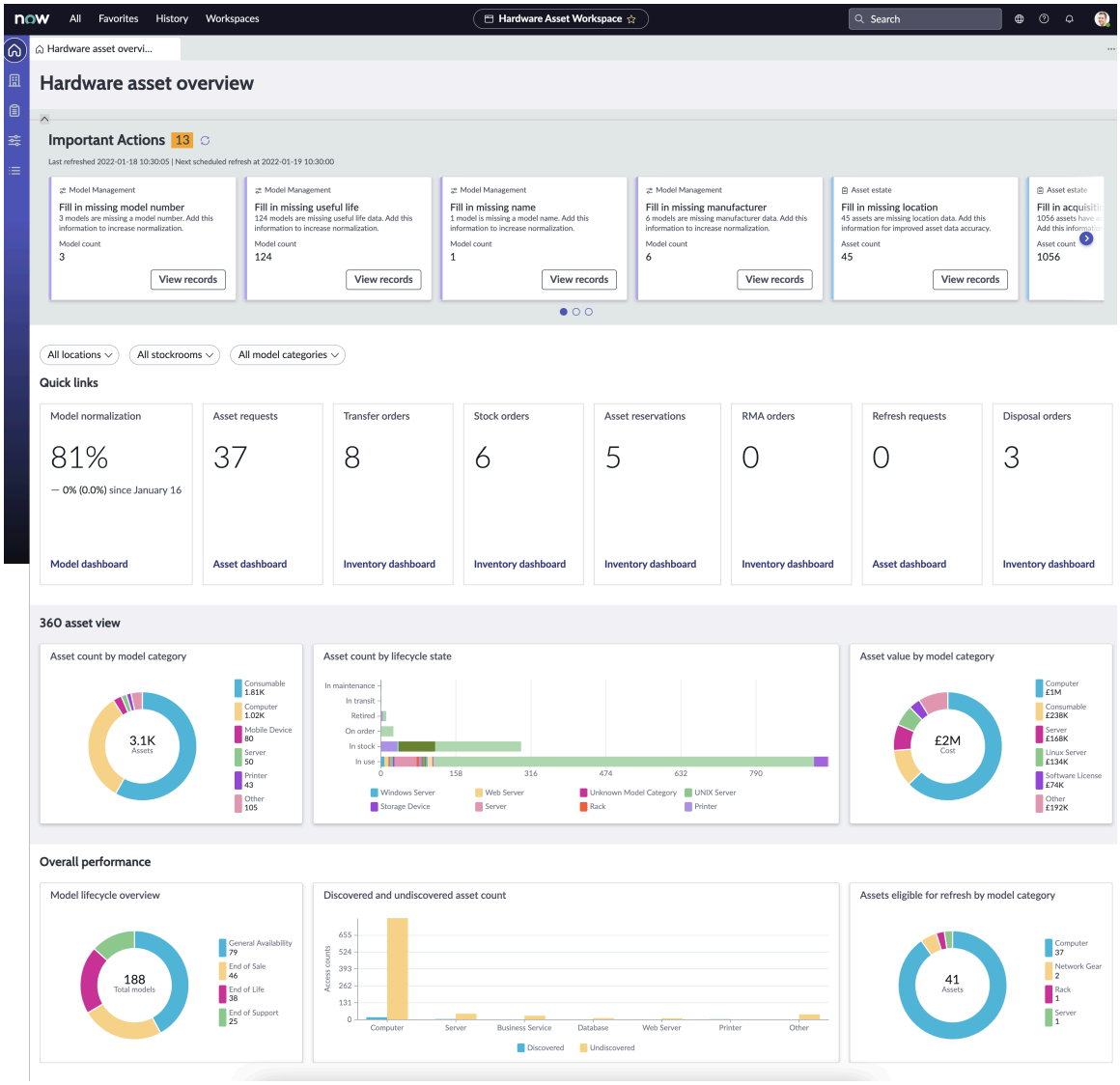
Use the Hardware asset overview view to:

- Act on discrepancies such as when an asset is missing PO number, model number, asset function, or manufacturer.
- Navigate to specific dashboards on asset functions such as Model normalization, Asset requests, Transfer orders, Stock orders, Asset reservations, RMA orders, Refresh requests, and Disposal orders.
- View the 360 asset view section displaying Asset counts by model category and lifecycle state, and asset value by model category.
- View the overall performance section displaying the Model lifecycle overview of all the assets, Discovered and undiscovered asset count, and Assets eligible for refresh by model category.

Select any widget or chart to view detailed information and take appropriate actions. You can also use **Location**, **Stockroom**, and **Model category** lists to filter your results.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware asset overview



Quick links

Widget or chart	Description
Model normalization	Percentage of hardware and consumable models that are normalized.
Asset requests	Number of requested items where the item's model is hardware, consumable, or bundle.
Transfer orders	Number of active transfer orders.
Stock orders	Number of requested hardware inventory stock order items.
Asset reservations	Number of active loaner asset orders.
RMA orders	Number of open RMA orders.
Refresh requests	Number of open hardware assets refresh order requests.
Disposal orders	Number of open hardware disposal orders.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

360 asset view

Widget or chart	Description
Asset count by model category	Number of assets grouped by the model category such as Consumable, Computer, and Mobile Device.
Asset count by lifecycle state	Number of assets grouped by the lifecycle state such as Retired, In use, and In stock.
Asset value by model category	Cost of assets grouped by the model category such as Software License, Consumable, and Server.

Overall performance

Widget or chart	Description
Model lifecycle overview	Overview of model lifecycle grouped by the lifecycle phase such as End of support, End of Life, General Availability, and End of Sale.
Discovered and undiscovered asset count	Comparison of the number of discovered and undiscovered assets grouped by model category. Undiscovered assets are the assets that are not discovered at all or not discovered within one month.
Assets eligible for refresh by model category	Number of assets that have already expired or the current day is the expiry date, and are eligible for a refresh.

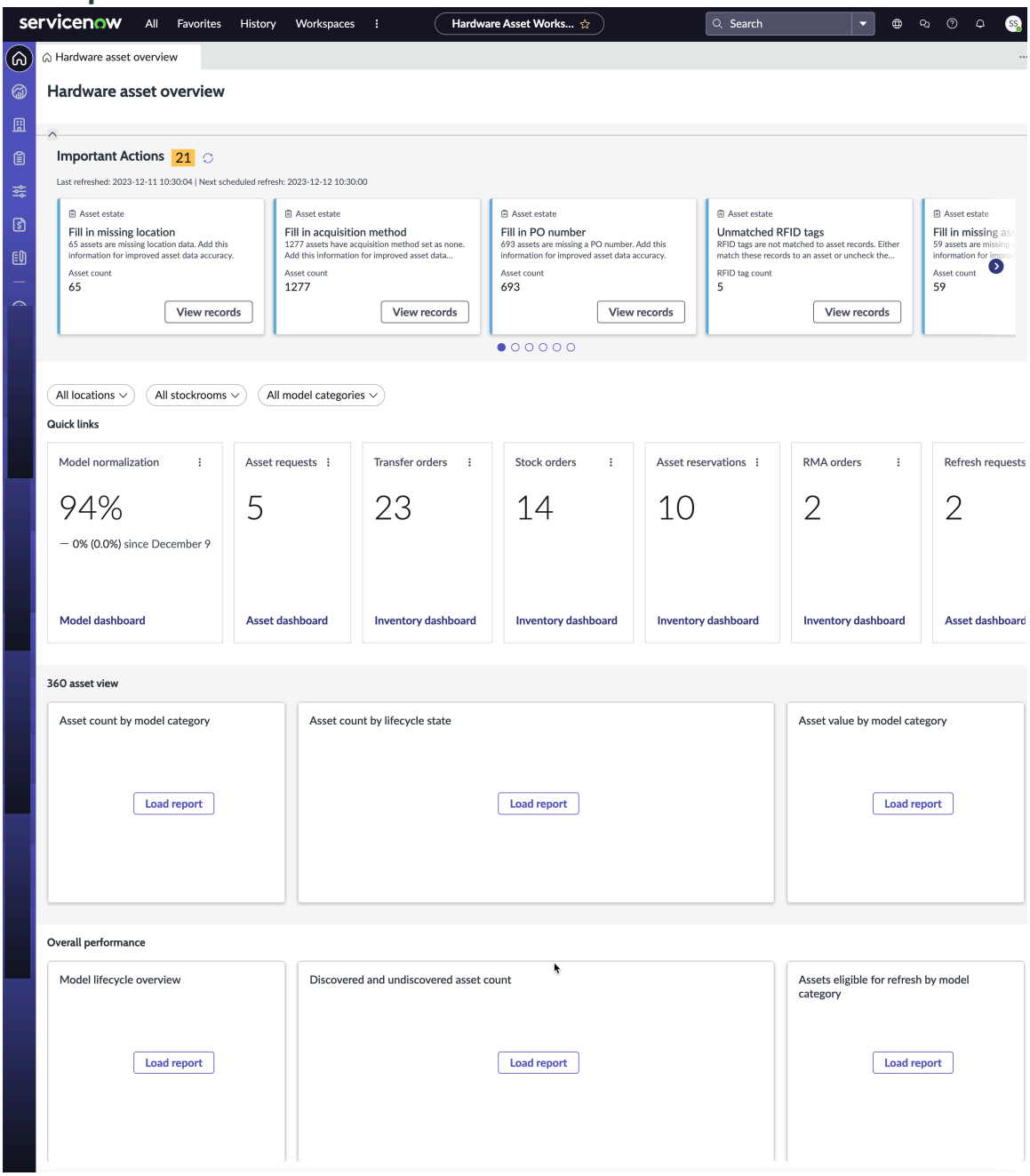
Load reports on Hardware asset overview

You can load charts or widgets that fetch a huge set of asset records on demand instead of loading them along with the page. This approach enables you to reduce the loading time for the Hardware asset overview page.

The system property *sn_itam_workspace.asset_overview_enable_lazy_loading* provides you with an option to either selectively load reports you want to view or load reports concurrently with the page. By default, this system property is set to **False**. When this system property is enabled on your ServiceNow instance, you can view reports by using the **Load report** option.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Load reports on Hardware asset overview



Related topics

Analytics and Reporting Solutions for Hardware Asset Management

Asset analytics view

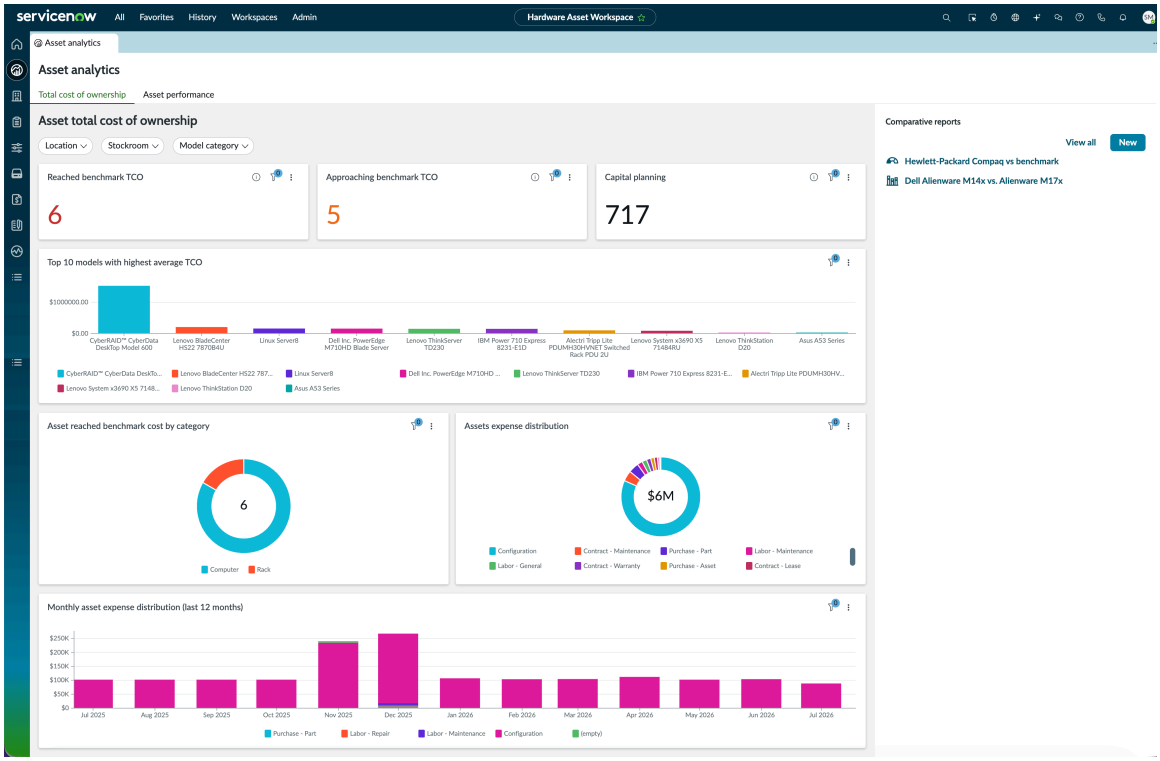
Use the Asset analytics view to get a detailed view of all your hardware assets, the total cost of ownership (TCO) of your assets, and the asset performance.

Total cost of ownership

For more information about the TCO of your assets, see Asset Total Cost of Ownership for Hardware Asset Management.

Important: The Asset Analytics view is available with Hardware Asset Management 10.0.0 version or later.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



You can filter and narrow down your results by selecting a location, stockroom, and model category.

Note:

TCO reports support domain separation when Domain Extension Installer (com.glide.domain.msp_extensions.installer) and Domain Support (com.snc.pa.domain_support) plugins are activated.

Asset total cost of ownership

Field	Description
Reached benchmark TCO	The number of assets that have their TCO more than or equal to the benchmark cost.
Approaching benchmark TCO	The number of assets that have their TCO more than or equal to the benchmark threshold but less than the benchmark cost. The TCO benchmark threshold percentage is set to 75% of the TCO benchmark cost by default. For example, if you have set the benchmark as $1000 and the asset cost has reached $750, the asset is considered to be approaching the benchmark TCO. Use the system property *sn_itam_common.asset_tco_benchmark_threshol* to update the benchmark threshold percentage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset total cost of ownership (continued)

Field	Description
	For more information about the hardware asset field values, see Asset record fields.
Capital planning	Number of assets for capital planning. The Assets for capital planning are assets that are not retired and their current life cycle phase is true.
Top 10 models with highest average TCO	Top 10 models that have the highest average asset TCO in a 12-month duration.
Asset reached benchmark cost by category	Number of assets whose asset TCO has reached benchmark cost based on model category.
Assets expense distribution	Costs incurred on your assets based on the expense categories such as labor, shipment, and purchase.
Monthly asset expense distribution (last 12 months)	Monthly initial and operational costs of your assets over the last 12 months.

Comparative reports

View the most recently created TCO reports in this section.

You can also create a report by selecting **New** in the Comparative reports section. For more information, Create a TCO report in Hardware Asset Workspace.

Asset performance

The Asset performance tab provides details on the average values of the following key performance indicators (KPIs):

- Availability
- Mean time between failures (MTBF)
- Mean time to repair (MTTR)

Note: For more details on calculation of KPIs, see Asset performance reports in the Hardware Asset Workspace.

By default, the **Model category** filter is applied to the KPI reports. To further narrow down and focus on specific data, you can also select any one of the following filters:

- **Location**
- **Model**

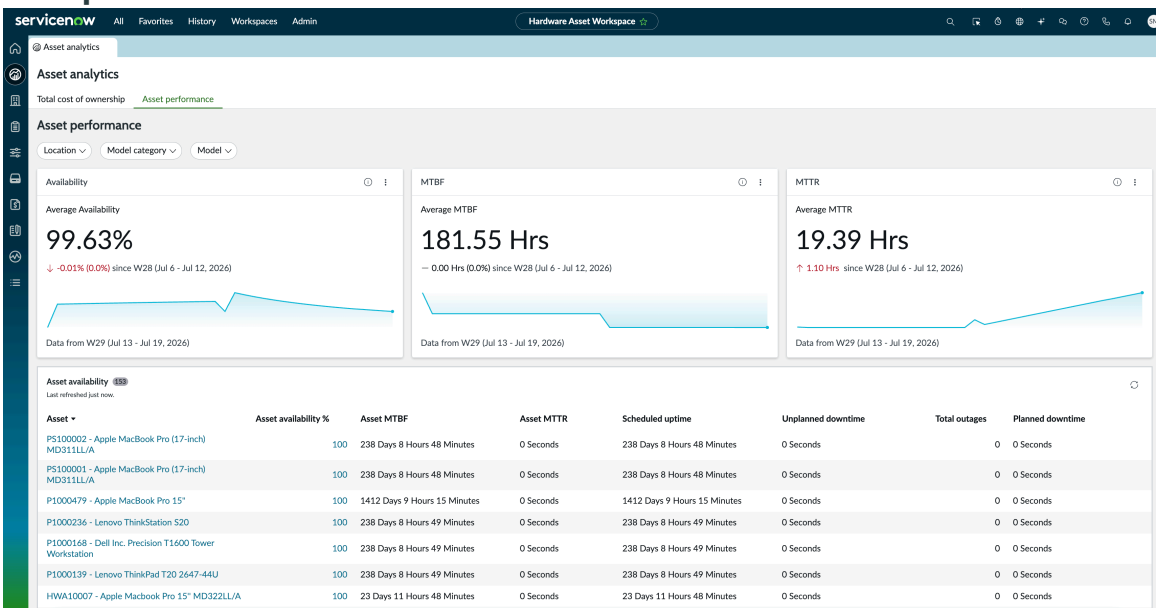
Note: You can apply a maximum of two filters to any KPI report.

You can see a weekly trend of the average KPI values in the report. The Asset Availability list provides KPI details for all hardware assets that are tracked. The average KPI values are calculated based on the assets in this list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

When you select any KPI report, the **KPI Details** page appears. This page enables you to explore the information within that KPI. You can set targets you want to achieve and also set signals to notify you of any significant changes in the KPI.

Asset performance dashboard



Widget	Description
Availability	Average availability percentage of all hardware assets that are tracked, calculated by dividing the total asset availability percentage by the number of assets listed in the Asset availability report.
MTBF	Average MTBF of all hardware assets that are tracked, calculated by dividing the total Asset MTBF by the number of assets listed in the Asset availability report.
MTTR	Average MTTR of all hardware assets that are tracked, calculated by dividing the total Asset MTTR by the number of assets listed in the Asset availability report.
Asset availability	Report that lists the availability and other related KPIs of all hardware assets that are tracked.

DaaS provider view

The DaaS provider view in the Hardware Asset Workspace is an intuitive interface of the Device as a Service application to manage the assets of the customers of DaaS providers.

Note: You must activate the following plugins to access the DaaS provider view:

- Hardware Asset Management application (sn_hamp)
- Hardware Asset Workspace (sn_itam_workspace)
- Hardware Asset Management for Device as a Service (com.sn_daas_ham)

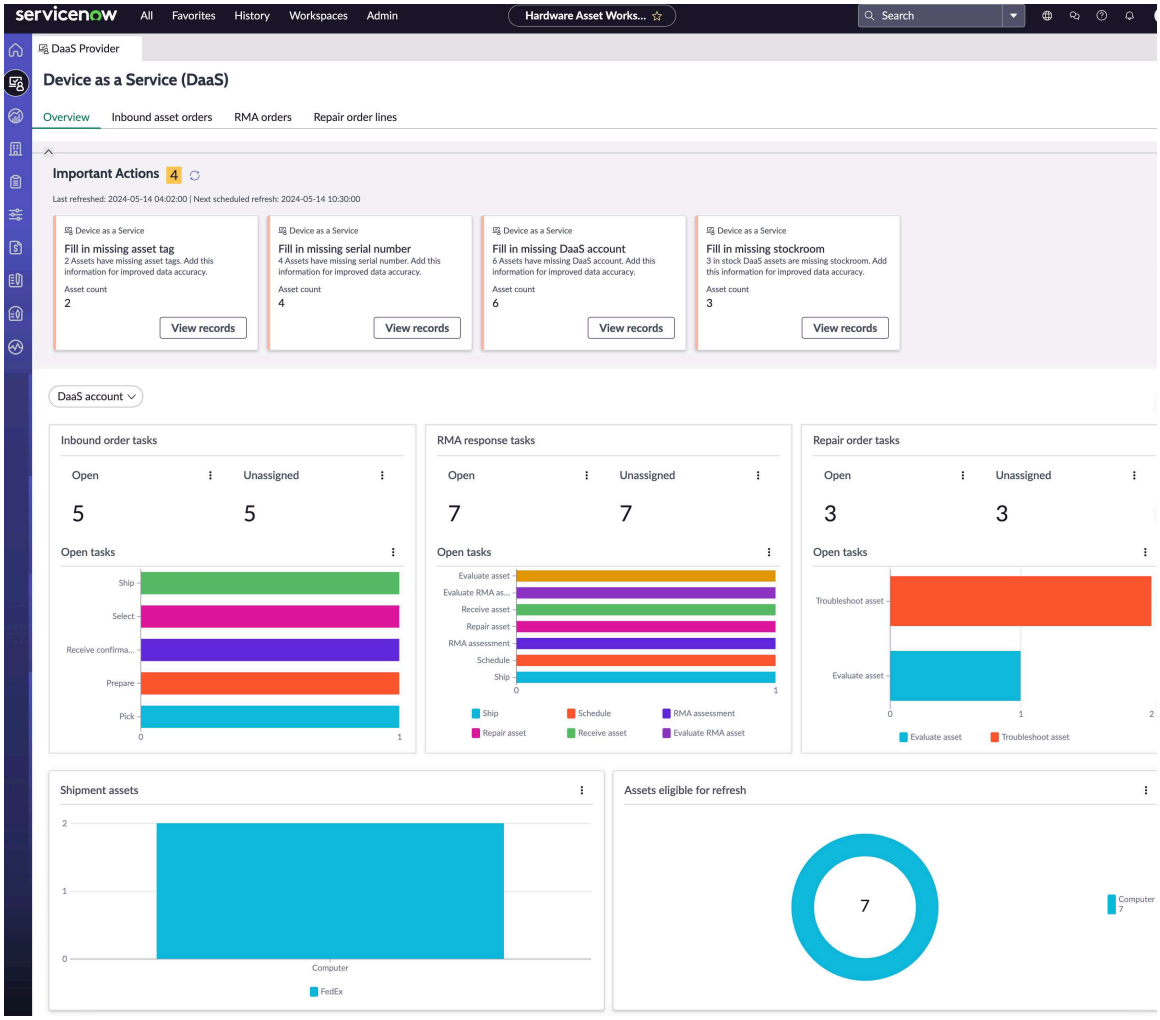
For more information about the DaaS feature, see Device as a Service.

Use the DaaS provider view to perform the following:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Act on discrepancies such as assets missing serial number, stockroom, or DaaS accounts.
- Select a DaaS account for which you want to view the records such as open or unassigned tasks, shipment status, and the number of assets that are eligible for refresh.
- Create and manage inbound asset orders, RMA response orders, and repair order lines for the DaaS assets of your customers.

Select any widget or chart to view detailed information and take appropriate actions on the assets that are marked as DaaS assets or dedicated to accounts.



Widget/Chart	Description
Important Actions	
Fill in missing asset tag	Action to be performed on the assets that have missing asset tag.
Fill in missing serial number	Action to be performed on the assets that have missing serial number.
Fill in missing DaaS account	Action to be performed on the assets that have missing DaaS accounts.
Fill in missing stockroom	Action to be performed on the assets that have missing stockroom information.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Widget/Chart	Description
DaaS account	Customer of the DaaS provider whose data is being referenced.
Inbound order tasks	• Open tasks: Number of open tasks in each stage of the Inbound asset order flow. • Unassigned tasks: Number of unassigned tasks in each stage of the Inbound asset order flow. The Inbound order flow includes the following stages: • Select • Pick • Prepare • Ship • Receive confirmation For more information, see Managing inbound asset orders for DaaS assets.
RMA response tasks	• Open tasks: Number of open tasks in each stage of the RMA response order flow. • Unassigned tasks: Number of unassigned tasks in each stage of the RMA response order flow. The RMA response order flow includes the following stages: • Evaluate asset • Schedule shipment • Receive confirmation • Repair asset • Schedule refresh For more information, see Managing RMA response orders for DaaS assets.
Repair order tasks	• Open tasks: Number of open tasks in each stage of the repair order flow. • Unassigned tasks: Number of unassigned tasks in each stage of the repair order flow. The repair order flow includes the following stages:
Shipment assets	Open shipment tasks in RMA response order or Inbound asset order flow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Widget/Chart	Description
Assets eligible for refresh	Number of assets that are eligible for refresh, which have surpassed the refresh date.

Inventory view

Use the Inventory view in the Hardware Asset Workspace to view the inventory functions such as Asset audits and Disposal orders and to take any inventory-related actions.

Use the following tabs to view the inventory functions and take appropriate actions:

- **Overview**: View various inventory data, such as the number of open hardware requests from stock, RMA request lines, and open transfer orders.
- **All stockrooms**: View, create, and manage stockrooms.
- **Asset audits**: Perform scheduled or blind audits of asset stockrooms and other locations such as offices or data centers.
- **Disposal orders**: Create and manage a disposal order for hardware or consumable assets that have reached their end of life cycle or are no longer functional.
- **Loaner asset orders**: View all the Loaner asset orders and take appropriate actions.
- **RMA orders**: View all the RMA orders and take appropriate actions.
- **RMA line items**: View all the RMA line items and take appropriate actions.
- **Transfer orders**: Create transfer orders, view existing transfer orders, and take appropriate actions.
- **Donation orders**: View the list of asset donation orders.
- **Repair orders**: View the list of repair orders submitted for repair of assets with your stockroom. You can also create repair orders.
- **Asset attestations**: Create asset attestations or attestation schedules to perform remote audits for hardware assets.

To create an asset audit for your inventory, select **New asset audit**. For more details, see Create an audit record in the Hardware Asset Management application.

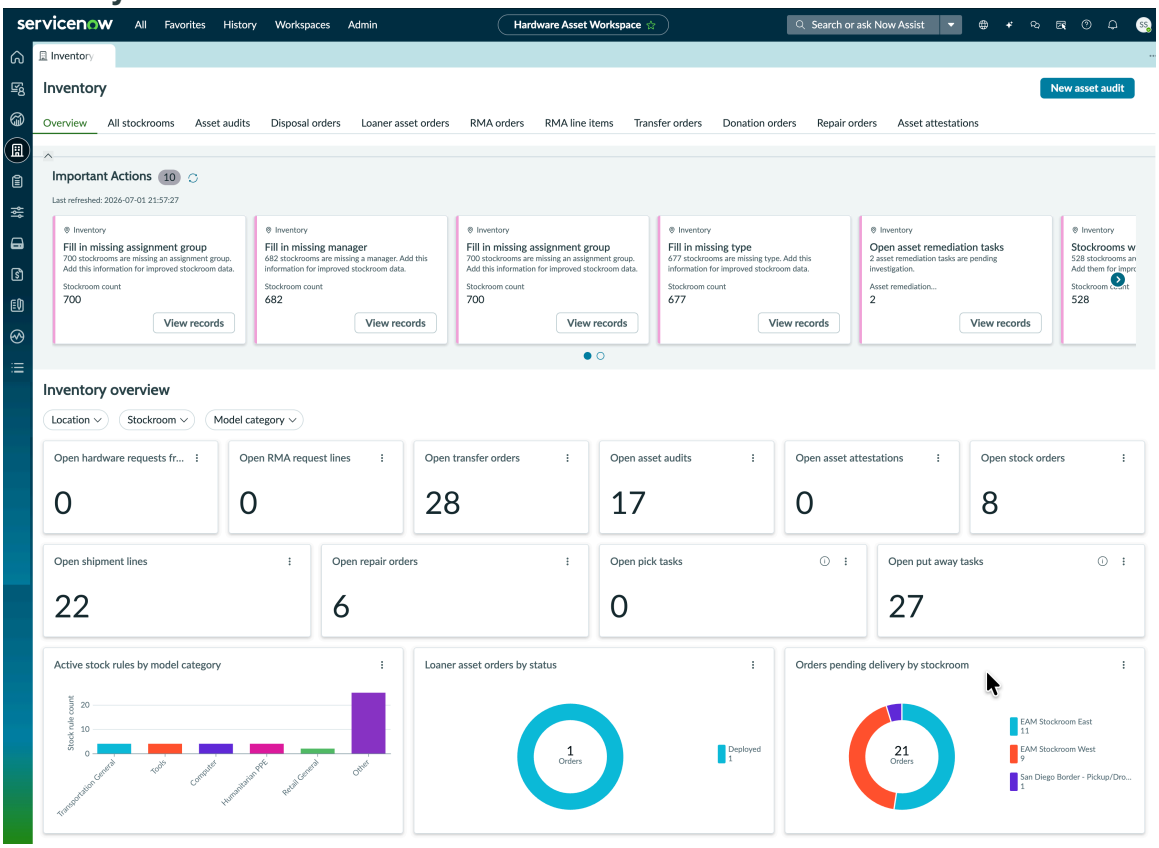
Note: You need the asset or inventory_admin role to access the Inventory view.

Overview tab

Use the **Overview** tab for a consolidated view of various inventory data as widgets. You can also view notifications about actions with links to act on discrepancies, such as incomplete information on asset audits or disposal orders.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inventory view



Select any widget or chart to view in detail and take required actions. You can also use **Domain**, **Location**, **Stockroom**, and **Model category** lists to narrow down your results. The **Domain** filter is available only when domain separation is enabled.

Inventory overview

Widget or chart	Description
Open hardware requests from stock (YTD)	Number of transfer orders of Procurement type that are already delivered and created this calendar year.
Open RMA request lines	Number of open RMA request lines.
Open transfer orders	Number of canceled or undelivered transfer orders.
Open asset audits	Number of asset audits that are currently new or in progress.
Open stock orders	Number of incomplete or canceled stock orders.
Orders pending delivery by stockroom	Number of purchase orders that aren't received or canceled.
Active stock rules by model category	All active stock rules grouped by their model category.
Loaner asset orders by status	Number of loaner asset orders grouped by their status, such as Return overdue, Deployed, and New.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

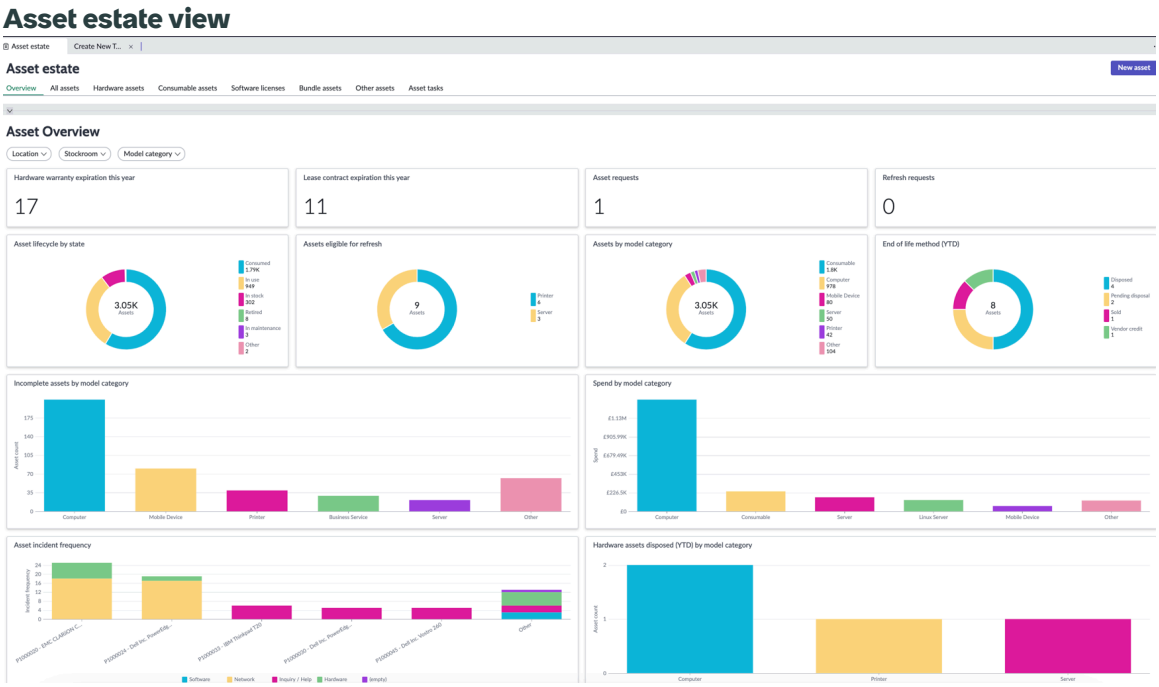
You can use the following important action cards related to service locations, distribution channels, and shipments to view the list of items that needs your action:

- Stockrooms missing service locations: List of stockrooms that aren't associated with any service locations. Stockrooms that are excluded from providing support to service locations aren't shown in the list.
- Stockrooms missing distribution channels: List of stockrooms that aren't associated with any distribution channels. Stockrooms that are excluded from having distribution channels aren't shown in the list.
- Stale shipments: List of shipments that weren't updated with the tracking information from the integrated carrier.
- Shipment data discrepancy: List of shipment records with the Carrier status as delivered and the Stage as In Transit.
- Carrier integration failures: List of integration profiles that failed to connect three consecutive times.
- Unmapped carrier profiles: List of integration profiles that aren't associated with a carrier.

Note: You can view **Stale shipments**, **Carrier integration failures**, and **Unmapped carrier profiles** important action cards with asset, inventory_admin, or ham_admin role.

Asset estate view

Use the Asset estate view in the Hardware Asset Workspace to view the asset functions and notifications such as expiring assets, expiring lease contracts, and take appropriate actions.



Note: The Software license tab is hidden when Software Asset Management (com.snc.software_asset_management) or Software Asset Management Professional (com.snc.pa.samp) is active. You can view this Software license tab in Software Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Overview

Widget or chart	Description
Hardware warranty expiration this year	Count of hardware and consumable assets that are expiring this current year.
Lease contract expiration this year	Count of lease contract models expiring this current year.
Asset requests	Count of hardware, consumable, and bundle requests in the catalog.
Refresh requests	Count of assets that are pending refresh.
Asset lifecycle by state	Number of assets grouped by the life cycle state such as Retired, In use, In stock.
Assets eligible for refresh	Assets nearing the end of life and which are eligible for refresh.
Assets by model category	Number of assets grouped by the model category such as Software License, Consumable, Server.
End of life method (YTD)	Assets retired until date in this current year.
Incomplete assets by model category	Asset models without purchase order number, purchase order line, or receiving line.
Spend by model category	Cost of assets grouped by their model category.
Asset incident frequency	Assets that have been reported with frequent incidents.
Hardware assets disposed (YTD) by model category	Assets disposed until the current date in this year and grouped by their model category.

To create hardware, software, consumable, bundle, pallet, mobile, and facility assets, select **New asset**. For more details, see Create assets.

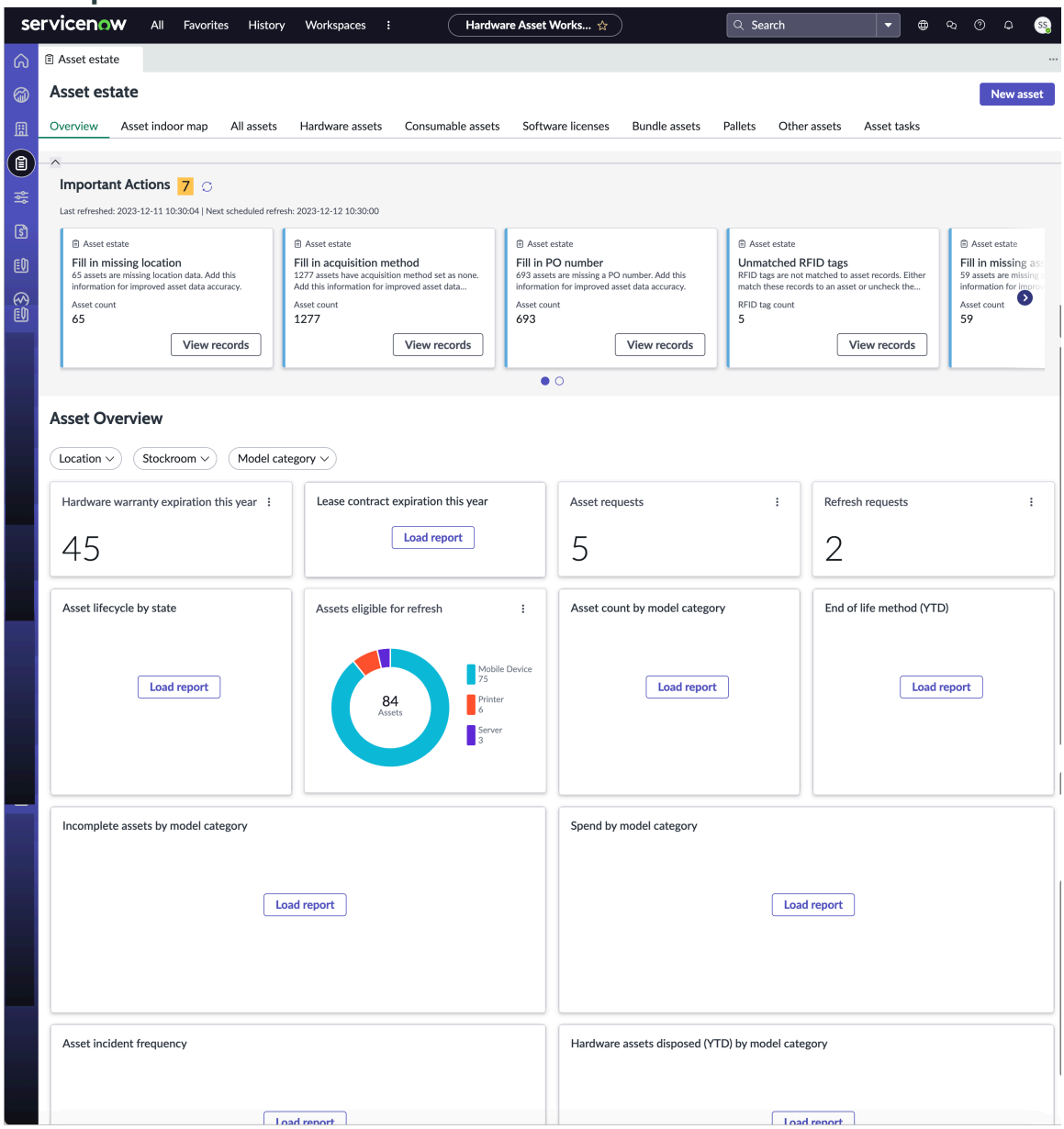
Load reports on Asset estate view

You can load charts or widgets that fetch a huge set of asset records on demand instead of loading them along with the page. This approach enables you to reduce the loading time for the Asset estate view.

The system property *sn_itam_workspace.asset_estate_enable_lazy_loading* provides you with an option to either selectively load reports you want to view or load reports concurrently with the page. By default, this system property is set to **False**. When this system property is enabled on your ServiceNow instance, you can view charts or widgets by using the **Load report** option.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Load reports on Asset estate view



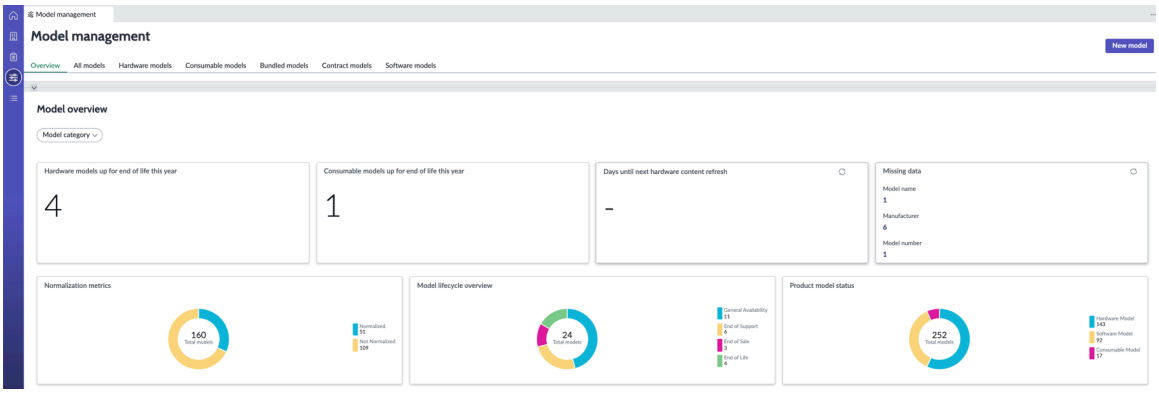
Model management view

Use the Model management view in the Hardware Asset Workspace to create or edit models, view the asset model-related functions such as hardware and consumable models nearing the end of life, and take appropriate actions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Model management view

All reports except **Days until next hardware content refresh** under the Model Management view get filtered based on the model category you choose.



Note: Software model tab is hidden when Software Asset Management (com.snc.software_asset_management) or Software Asset Management Professional (com.snc.pa.samp) is active. You can view this Software model tab in Software Asset Workspace.

Model overview

Widget or chart	Description
Hardware models up for end of life this year	Count of hardware models whose start date of the end of life phase is the current year.
Consumable models up for end of life this year	Count of consumable models whose start date of the end of life phase is the current year.
Days until next hardware content refresh	Number of days after which the next hardware content refresh will be performed by Hardware Asset Management.
Missing data	Count of models that have missing model name, manufacturer, and model number.
Normalization metrics	Count of models that were normalized and those models that didn't get normalized.
Model lifecycle overview	Count of models that are present in each life cycle stage such as General Availability, End of Support, End of Life, and End of Sale.
Product model status	Current count of hardware, consumable, and software models based on the status of the models.

Content lookup portal for Hardware Asset Management

The Content lookup portal gives you visibility into the data stored in the Content Library as part of the IT Asset Management Content Service via an intuitive user interface.

The Content Library is a repository of hardware product names and all additional information such as hardware product lifecycle dates and model numbers. This information is stored in different tables in the Content Library.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Content library portal application is available in the ServiceNow Store. After you install the application, verify that the AI Search (com.glide.ais) plugin is activated. For more information about installing Content library portal application, see Install Content lookup to view Hardware Asset Management data.

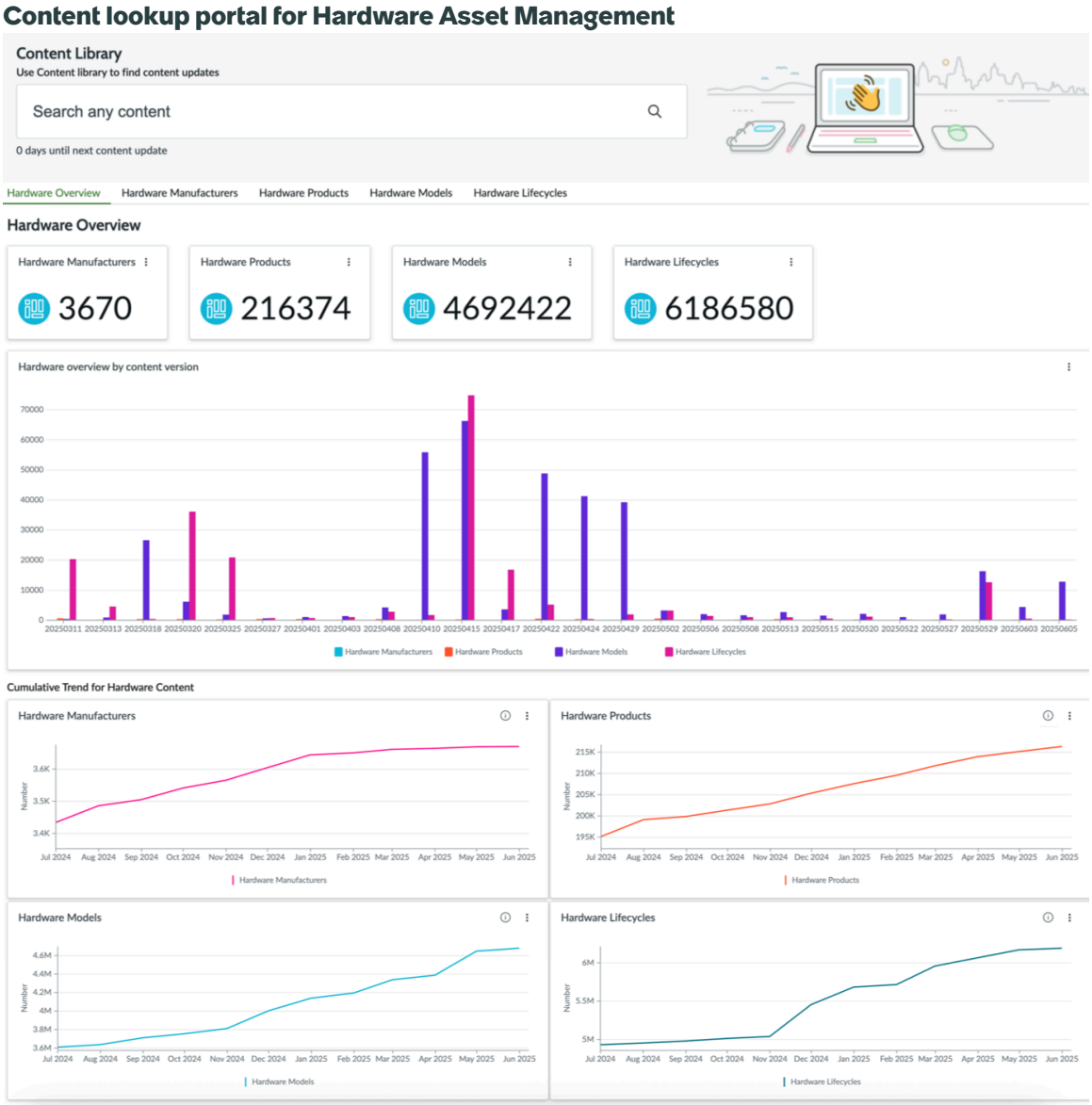
The Content lookup portal enables you to do the following:

- Search for hardware products, manufacturers, lifecycles, or model numbers.
- View the entire list of hardware products, manufacturers, lifecycles, and model numbers in the Content Service.
- View additional details related to hardware products such as model numbers, and life cycle phases of hardware models.
- View the cumulative days remaining for the next content update.

Access the Content lookup portal by navigating to *Hardware Asset Workspace* > **Content lookup**.

Note: After installing the Content library portal application, when you access Content lookup portal for the first time, the charts aren't populated on the page due to the absence of historical data. To load the charts, execute the Historical Data Collection jobs. For details, see the Historical Data Collection job article in the Now Support Knowledge Base.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



On the Content lookup portal, you can view the information based on the applications that are installed.

- If only the Hardware Asset Management application is installed and you have the asset role, you can view the following tabs showing the data stored in the Hardware Asset Management Content Service:
  - Hardware Overview
  - Hardware Manufacturers
  - Hardware Products
  - Hardware Models
  - Hardware Lifecycles
- If both Software Asset Management Professional and Hardware Asset Management applications are installed and you have both asset and sam_user roles, you can view both hardware and software content tabs. For more information about the Software Asset Management Content library portal, see the Content lookup portal for Software Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Content lookup portal uses the AI search functionality and helps you to search for a specific hardware manufacturer, product, and model number. After you enter your search criteria in the search bar, the search results are listed with the most relevant matches at the top. Using the Filters section, you can further narrow down the result.

Based on your search criteria, the information in the Content Service is pulled from the following tables.

- Hardware Product [sn_hamp_hw_product]
- Hardware Model Libraries [sn_hamp_hw_product_model]
- Hardware Manufacturer [sn_hamp_hw_manufacturer]
- Hardware Lifecycle Definition [sn_hamp_lifecycle_definition]

Select the search result that matches your criteria to display the details of the content record and related lists. The content record page opens in read-only mode.

Hardware Overview tab

The **Hardware Overview** tab is by default displayed when you navigate to the Content library portal. View the following hardware widgets on this page:

Hardware metrics

Report	Source	Description
Hardware Manufacturers	Hardware Manufacturers [sn_hamp_hw_manufacturer]	Total number of hardware manufacturers stored in the Content Library. Select the number of manufacturers to view the list of manufacturers. By default, all active records are populated on the list.
Hardware Products	Hardware Products [sn_hamp_hw_product]	Total number of hardware products stored in the Content Library. Select the number of products to view the list of Hardware products. By default, all active records are populated on the list.
Hardware Models	Hardware Model Libraries [sn_hamp_hw_product_model]	Total number of hardware models stored in the Content Library. Select the number of models to view the list of Hardware models. By default, all active records are populated on the list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware metrics (continued)

Report	Source	Description
Hardware Lifecycles	Hardware Lifecycle Definitions [sn_hamp_lifecycle_definition]	Total number of life cycle records of hardware models stored in the Content Library. Select the count of lifecycles to view the list of hardware model lifecycle phases. By default, all active records are populated on the list.
Hardware overview by content version	• Hardware Products [sn_hamp_hw_product] • Hardware Model Libraries [sn_hamp_hw_product_model] • Hardware Manufacturers [sn_hamp_hw_manufacturer] • Hardware Lifecycle Definitions [sn_hamp_lifecycle_definition]	Graphical representation of count of the hardware content released across various content versions. The information is grouped by the content version. Select a specific bar on the chart to view the detailed list of the hardware content. You can view the hardware content released in that particular content version on the list page.
Cumulative Trend for Hardware Content	• Hardware Products [sn_hamp_hw_product] • Hardware Model Libraries [sn_hamp_hw_product_model] • Hardware Manufacturers [sn_hamp_hw_manufacturer] • Hardware Lifecycle Definitions [sn_hamp_lifecycle_definition]	Graphical representation of cumulative trend of hardware content released every month. Cumulative trend chart for the following hardware content is displayed: • Hardware Manufacturers • Hardware Products • Hardware Models • Hardware Lifecycles Select a specific point on the trend line to view a detailed list of the hardware content. On the list page, you can view the cumulative software content released for that particular content until the 1st of that month. For example, you selected the July 2025 trend point on the Hardware Products chart. The Hardware Products list table displays hardware products released until 1st July 2025.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware Manufacturers tab

View a list of hardware manufacturers released in the Content Library. On the Hardware manufacturers list, only active manufacturers are displayed with a default filter condition applied. Select the manufacturer's name to view the manufacturer details.

Hardware Products tab

View a list of hardware products released in the Content Library. On the Hardware products list, only active products are displayed with a default filter condition applied. Select the product's name to view the product details.

Hardware Models tab

View a list of hardware models released in the Content Library. On the Hardware models list, only active models are displayed with a default filter condition applied. Select the Model number to view the model details.

On the Hardware Model form, the **Copy model details** option enables you to copy the details of a model and add a model entry to the Product Model [cmdb_model] table. For more information about copying model details, see Copy a hardware model from the Content lookup portal.

Hardware Lifecycles tab

View a list of life cycle records of hardware models released in the Content Library. On the Hardware lifecycles list, only active lifecycles are displayed with a default filter condition applied. Select the Product model to view the hardware product lifecycle details.

Install Content lookup to view Hardware Asset Management data

Install the IT Asset Management Content lookup (sn_itam_contlookup) application to view the data stored in the Hardware Asset Management Content Service.

Before you begin

- Install Hardware Asset Management Professional (com.sn_hamp) from ServiceNow Store.
- Activate the AI Search (com.glide.ais) plugin.

Role required: asset

About this task

If you have installed the Software Asset Management Professional (com.sn_samp_master) plugin, you can view data stored in the Software Asset Management Content service. If you have installed both Software Asset Management Professional (com.sn_samp_master) and Hardware Asset Management (com.sn_hamp) plugins, you can view both their content data on the IT Asset Management Content lookup (sn_itam_contlookup) application. You can also filter your search results based on the content type, such as software or hardware. For more information about installing the Content lookup portal for Software Asset Management, see Install Content lookup portal for Software Asset Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the IT Asset Management Content lookup (sn_itam_contlookup) application using the filter criteria, search bar, and product tabs.

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

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

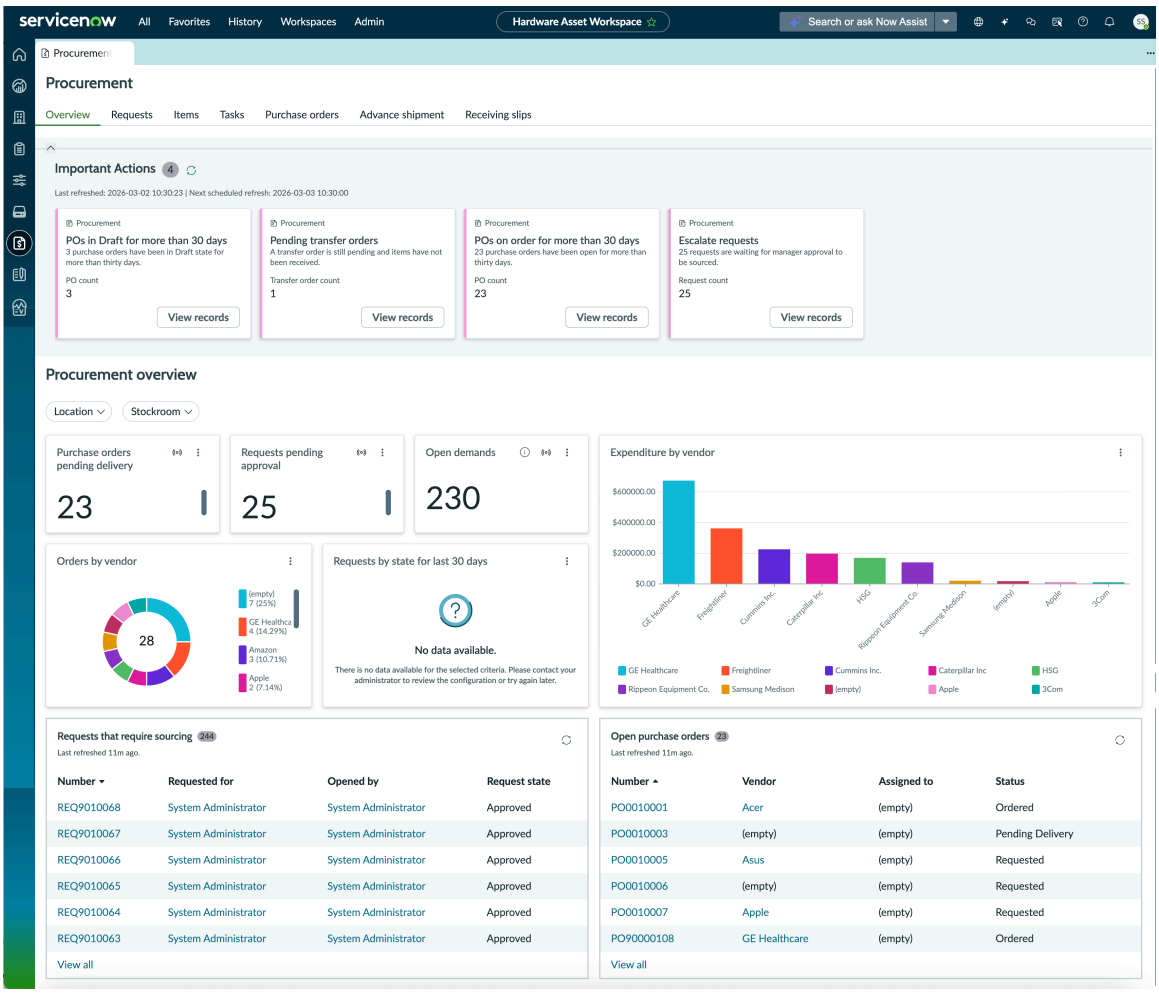
3. In the Application installation dialog box, review the application dependencies.
4. Select **Install**.

Procurement view

Use the Procurement view in the Hardware Asset Workspace to view and manage procurement-related details such as procurement requests, purchase orders, sourcing tasks, and receiving slips.

The Procurement view provides access to actions for managing your open requests, pending purchase orders and transfer orders, and requests that need manager approval.

Procurement view



Select any widget or chart to view the details. You can also use **Location**, **Stockroom**, and **Domain** filters to narrow down your results.

Note: The Domain filter is available only when you've enabled the Domain Extensions Installer (com.glide.domain.msp_extensions.installer) and Domain Separation (plugin com.snc.pa.domain_support) plugins.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procurement overview

Widget or chart	Description
Purchase order pending delivery	Count of purchase orders that aren't in a Canceled or Received status. This includes purchase orders with a status of Requested, Ordered, Pending Delivery, and Suspended.
Requests pending approval	Count of sourceable and active requests with request state of pending approval.
Expenditure by vendor	Cost that you've paid to each of your vendors for procuring the inventory. Only purchase orders that have a status of Ordered, Pending Delivery, or Received are listed.
Orders by vendor	Purchase orders that have been ordered, are pending delivery, or have been received by the vendor.
Requests by state for last 30 days	Requests created in last 30 days grouped by state.
Requests that require sourcing	List of requests for which a purchase order, local order, or transfer order hasn't been initiated.
Open purchase orders	List of purchase orders that have been requested, ordered, or not delivered.

Related topics

Procurement

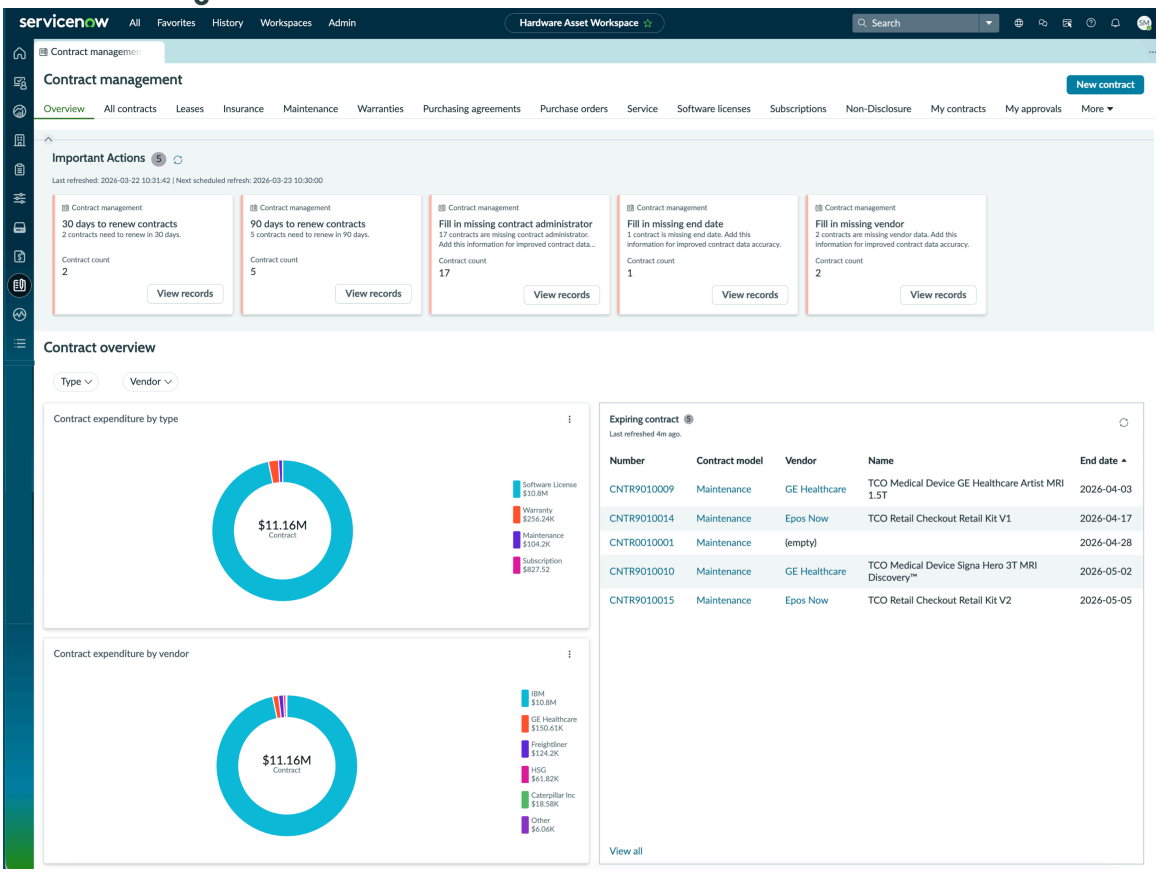
Contract management view

Use the Contract management view in the Hardware Asset Workspace to view and manage details of contracts such as Contract number, Contract start and end dates, terms and conditions statements.

The Contract Management view includes important actions for managing your contract, contract expenditure by type and vendor, and the list of expiring contracts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Contract management view



To create a contract, select **New contract**. For more details, see Create a contract.

Related topics

Contract Management

Contract renewal workflow

Success portal view in Hardware Asset Workspace

Use the Success portal view in Hardware Asset Workspace to track the progress of your Hardware Asset Management (HAM) application with success goals, assign activities to track the success of your goals, and mature your HAM program with predefined maturity items.

Success portal helps you perform the following actions:

- **Track the progress of your HAM application through success goals**

  Success goals help you analyze the value that you get out of your hardware assets and calculate your projected savings. Create success goals for the assets that you want to track. For more information about creating a success goal, see Create a success goal for Hardware Asset Management.

- **Track the progress of your success goals**

  Track the success of your goals by creating success activities for the goals. For more information, see Create success activities for HAM success goals.

- **Mature your HAM program with predefined maturity items**

  The program maturity is categorized into Crawl, Walk, and Run stages to help you improve the value return of your HAM application within your organization. You can link these maturity items

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

to success goals and use the HAM application efficiently. For more information, see View all maturity items for Hardware Asset Management.

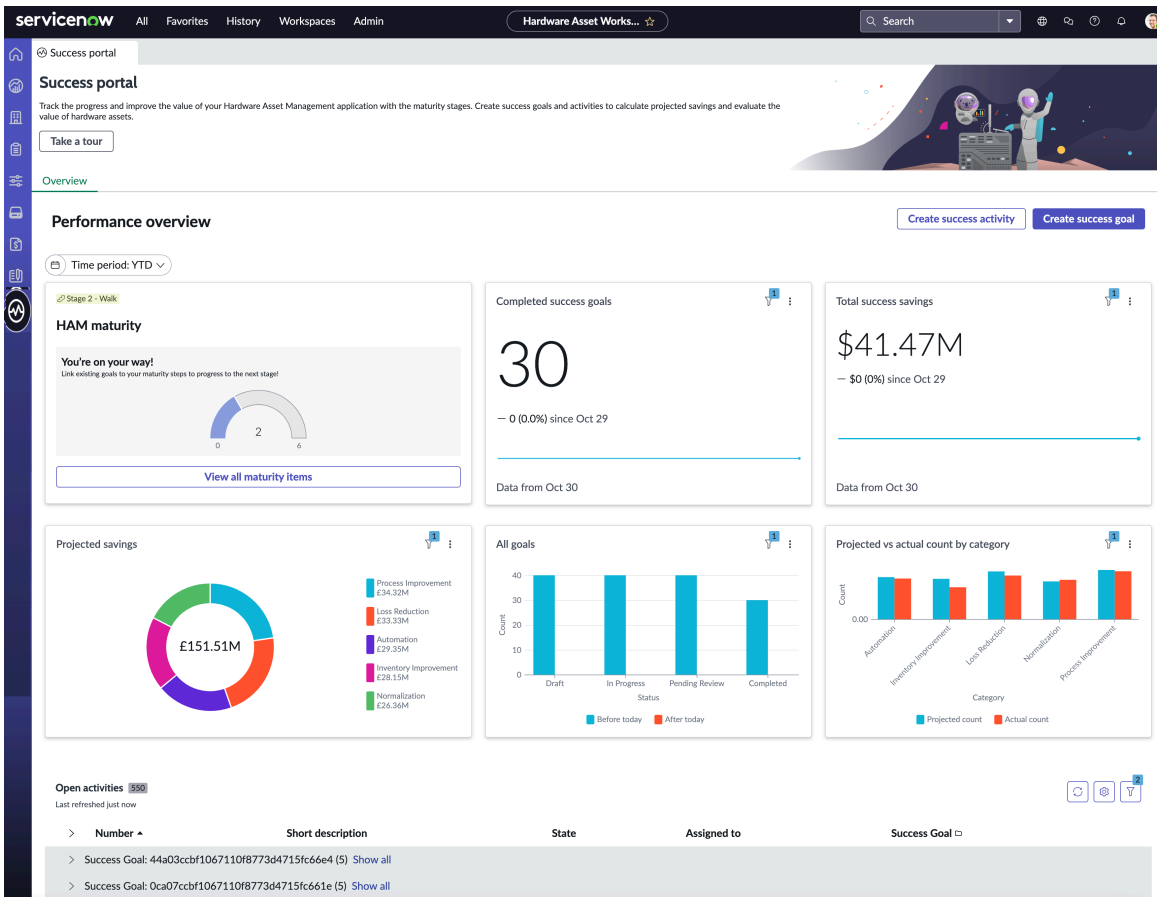
Important: The HAM maturity program is available with the Hardware Asset Management 10.0.0 version or later.

Email notifications are sent when the following conditions are met:

- To a group, when a success goal is assigned to that group.
- To an owner, when a success goal is assigned to that owner.
- To an owner, when a success goal is marked as Pending Review.
- To an assigned user or an assignment group, when a success activity is assigned.

Access the Success portal by navigating to **Hardware Asset Workspace** > **Success portal**.

The Success portal supports domain separation when the Performance Analytics - Domain Support plugin (com.snc.pa.domain_support) is activated. To filter the data by domain, select a domain at the top of the dashboard.



To narrow down your results, you can filter by time period.

Success portal dashboard

Widget	Description
HAM maturity	Current stage of your HAM program maturity such as the Crawl, Walk, or Run stage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Success portal dashboard (continued)

Widget	Description
	View the maturity items of each stage by selecting **View all maturity items**. For more information, see View all maturity items for Hardware Asset Management.
Completed success goals	Total number of completed success goals.
Total success savings	Actual savings from the completed success goals.
Projected savings	Anticipated savings from the success goals are grouped by the status and category of the goal.
All goals	Complete list of success goals with one of the following statuses: • Draft • In Progress • Pending Review
Projected vs actual count by category	Comparison between the projected and actual success goals count with status as **Draft**, **In Progress**, or **Pending Review**.
Open activities	Open success goal activities.

Important: The **HAM maturity**, **Total success savings**, **Projected savings**, and **All goals** fields are available with the Hardware Asset Management 10.0.0 version or later.

Asset operations view

Use the Asset operations view in the Hardware Asset Workspace to view the asset operations-related functions such as stock rules, stock orders, procurement sourcing requests, all contract renewal requests, contract renewal line items, custom products, custom models, and take appropriate actions.

The Asset operations view includes the following list:

- Inventory
  - Stockroom types: View types of stockrooms. For more information, see Create a stockroom type.
  - Stock rules: View stock rules associated with the stockroom. For more details, see Create a stock rule.
  - Stock orders: View stock orders associated with the inventory.
- Shipment
  - Shipments: View and track the shipments from different sources or flows. For more information, see View hardware asset shipment details.
  - Shipment assets: View the list of assets included in the shipments. For more information, see View hardware asset shipment details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

  - Shipping carriers: Create and view the list of shipping carriers. For more information, see Create a shipping carrier record.
  - Carrier integration profiles: View the list of carrier integration profiles associated with the shipping carriers. For more information, see View the carrier integration profile details.
- Procurement-Requests: View and track procurement requests. For more information, see Sourcing items in a service catalog request.
- Contracts
  - Obligations: View the details of obligation records to fulfill the responsibilities specified in the contract. For more information, see Create an obligation record in the Hardware Asset Workspace.
  - Obligation tasks: View the details of obligation tasks associated with obligation records. For more information, see Create an ad hoc obligation task in Hardware Asset Workspace.

    Note: These options are available if you have HAM integration with the Contract Management Pro application. For more information, see Hardware Asset Management integration with Contract Management Pro.

- Hardware asset normalization
  - Custom products: View details of custom products that aren't represented in the Asset Management Content Service. For more information, see Add a custom product.
  - Custom models: View details of custom models. For more information, see Create a hardware or consumable model.
  - Calculated lifecyle templates: View and create life cycle templates and formulas that can be applied on hardware and consumable models. For more information, see Manage the lifecycle of hardware models with calculated lifecycle templates.
- Contract Renewal
  - All contract renewal requests: View details of all contract renewal requests.
  - Contract renewal line items: View details of all line items associated with contract renewal requests.

  For more information, see Contract renewal workflow.

- KPI configuration
  - KPI opt in: Enable the asset performance tracking by opting in to the model categories of the assets. For details, see Opt in to model categories to track performance KPIs for hardware assets.
  - Operational schedules: Create and view operational schedules for hardware assets. For details, see Create an operational schedule for hardware assets
  - Asset schedules: Link hardware assets to their respective operational schedules and align KPI records accordingly. For details, see Map hardware assets to an operational schedule
- TCO configuration
  - Task rate card: Define the type of task and the method of calculating the associated costs, and view the details of the created task rate cards. For more information, see Create a task rate card in Hardware Asset Workspace.
  - Labor rate card: Record the time worked on a task and associate a rate to the task, and view the details of the created labor rate cards. For more information, see Create a labor rate card in Hardware Asset Workspace.
- Zero touch

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

  - Asset requests: View the list of hardware asset requests of your employees submitted through the Zero Touch request flow. For more information, see Use Zero Touch request flow.
  - Provider integration profiles: Create a provider integration profile to transform the Scratchpad updates from your provider into a format required for the Zero Touch request flow. For more information, see Create a provider integration profile.
- Zero touch refresh
  - Requests: View the list of Zero Touch Refresh requests of your employees. For more information, see Process a Zero Touch Refresh request.
  - Refresh models: Create and view the list of refresh models with the configured replacement models. For more information, see Configure replacement models for a refresh model.
- Attestation
  - Attestations: View the list of asset attestation requests. For more information, see Create an asset attestation in the Inventory view.
  - Schedules: View the list of attestation schedules that create recurring attestation requests. For more information, see Cancel an attestation schedule.
- Hardware asset success
  - Success goals: Create success goals and view the list of created success goals for Hardware Asset Management. For more information, see Create a success goal for Hardware Asset Management.
  - Success activities: Create success activities and view the list of created success activities for Hardware Asset Management. For more information, see Create success activities for HAM success goals.
  - Success categories: Create a category for a success goal and view the list of categories. For more information, see Create a success goal category for hardware assets.
  - Hardware maturity: View items that help you drive the success of your hardware assets. For more information, see View all maturity items for Hardware Asset Management.
- Asset audits: View deprecated audit records created in the Asset Audits [sn_hamp_asset_audit] table before upgrading to the audit enhancements introduced in Hardware Asset Management version 15.0.0. For more information, see View deprecated audit records.

  Important:

  If you have enabled the audit enhancements and switched to the common audit table, new asset audit records are now stored in the Asset Audits [sn_itam_common_asset_audit] table. After the switch, you can't view deprecated audit records (created before switching to common table and stored in the Asset Audits [sn_hamp_asset_audit] table) in the **Asset audits** tab from the Inventory view.

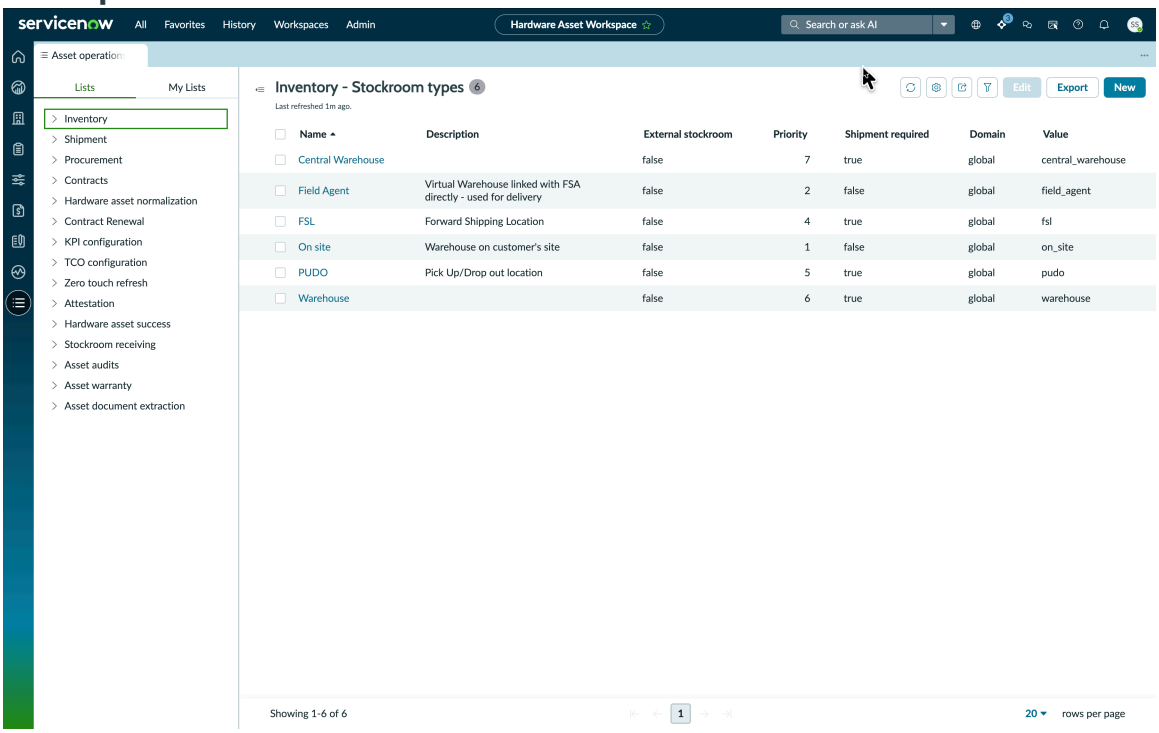
  You can view the deprecated audit records from the Asset Operations view, when the *migrate_hamaudit* system property to **true**.

- Asset warranty: View the warranty details of Lenovo hardware assets. For more information, see Track the warranty details of your Lenovo assets.

You can also create and easily access your custom list views from the **My Lists** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset operations



Related topics

- Inventory view
- Request items source
- Work with hardware normalization

Mobile app for Hardware Asset Management

Use the ServiceNow Mobile and ServiceNow Agent apps to manage your assets.

ServiceNow Agent app

Use the ServiceNow Agent app to create assets, look up assets, and receive assets from a purchase order.

Create an asset

Use the ServiceNow Agent app to create an asset record by scanning the asset.

Before you begin

Download the ServiceNow Agent app from Apple App Store or Google Play Store.

Role required: asset

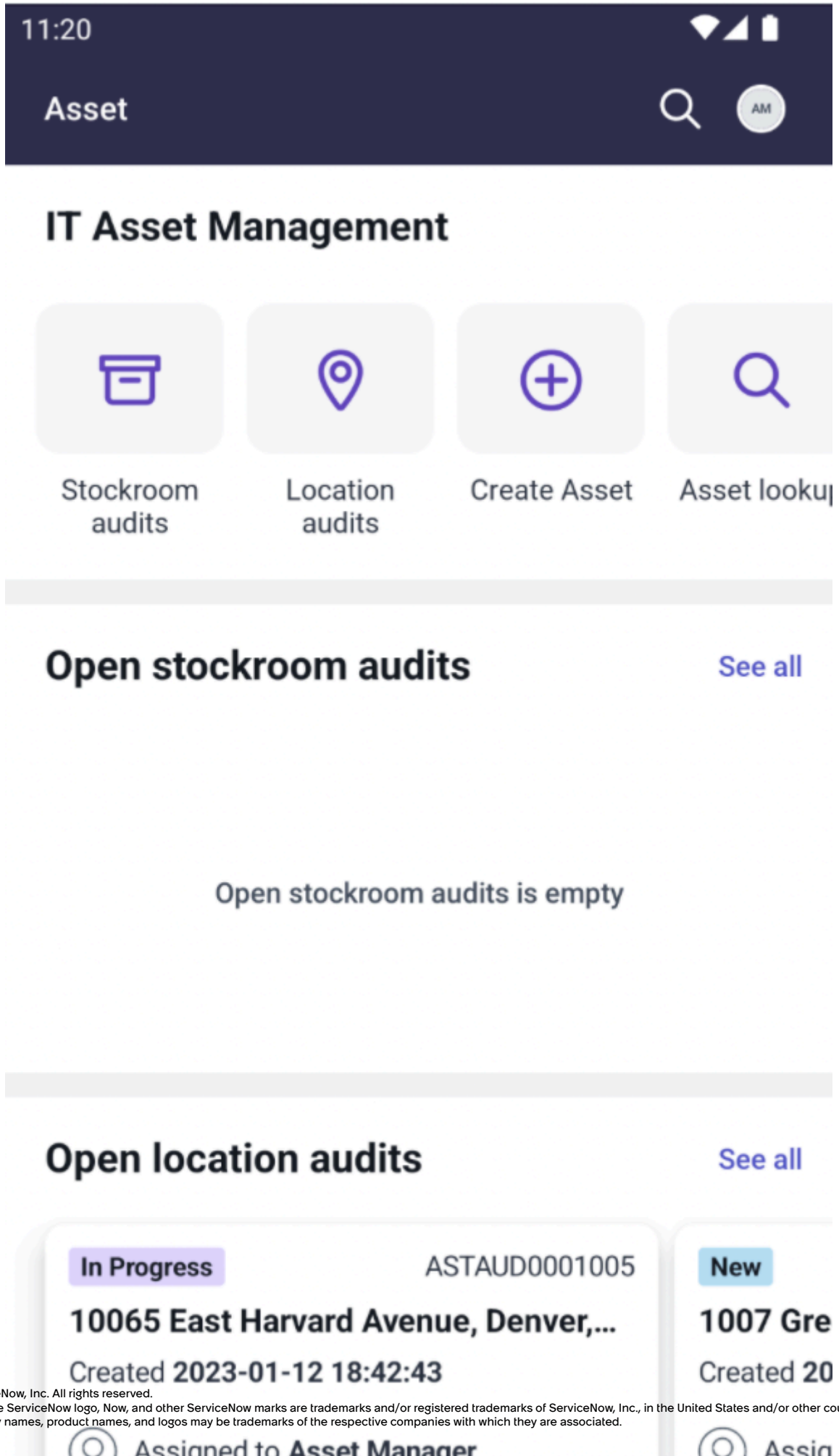
The Procurement plugin (com.snc.procurement) must be installed to get the procurement features in ServiceNow Agent app.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Asset** and tap **Create Asset**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Scan the asset serial number or asset tag, then tap **Search**.
   If the asset exists in your ServiceNow instance, an asset record is displayed. This information is to ensure that you don't create duplicate asset records.
3. **Optional:** To update an existing asset, select the asset and then tap **Update Asset**.
4. If no existing asset record is found, tap the action icon in the upper right and select **Create Asset**.
5. Scan or enter values for the **Asset Tag**, **Serial Number**, **Model** (non-software), **Stockroom**, **State**, and **Substate** fields.
6. Tap **Submit** to create the asset.

Asset lookup

Search for an asset record in your ServiceNow instance by scanning the asset.

Before you begin
Role required: asset

Procedure

1. Navigate to **Asset** and tap **Asset lookup**.
2. Scan the asset tag, then tap **Search**.
3. An asset record is displayed if the asset exists in your ServiceNow instance.
   You can select the existing asset to update it or to create an incident related to it.

Receive assets from a purchase order

Scan assets from a purchase order (PO) to verify that you received all assets from the order.

Before you begin
Role required: procurement_admin or procurement_user

Procedure

1. Navigate to **Procurement** and tap **POs Next 30 Days**.
2. Select a purchase order.
3. Tap **Related list**.
4. Tap the **PO Line Items** asset that you ordered and swipe **Receive** to receive the asset.
5. If you only need to receive a single purchase, on the Receive form, scan the QR code for either the asset tag or serial number.
6. If you need to receive multiple purchases, on the Receive form, tap **Scan next item** until you've scanned all of your purchases.
7. Tap **Submit**.

Result
The purchase order is marked as received.

Verify and depart your assets for disposal

Use the ServiceNow Agent app to scan, verify, and depart your assets for disposal.

Before you begin
To verify an asset using the ServiceNow Agent app, make sure that a Disposal order exists in your Hardware Asset Management instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role required: asset

About this task

After a Disposal order is initiated for your asset, use the ServiceNow Agent app to scan, verify, and depart the asset. You do not have to manually verify and depart your assets.

On the app, you can use the same functionalities when you are offline. For more information, see Offline mode.

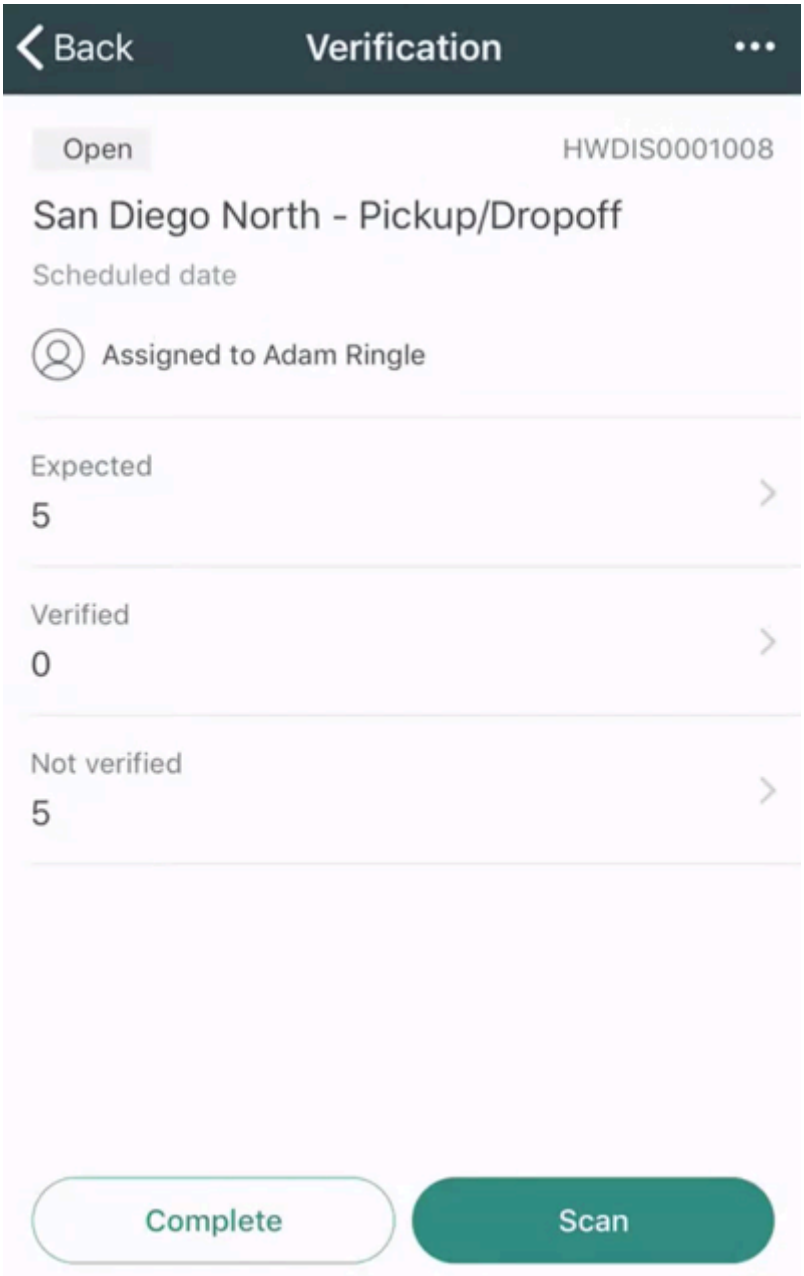
Procedure

1. Navigate to **All** > **Asset** > **Asset disposal**.
   The **Verification** tab shows the list of verification tasks, while the **Departure** tab shows the list of departure tasks. These tasks are for the assets that are present in a particular asset location for disposal.
2. Scan and verify your assets in one of the following ways.
   - Swipe a verification task to the left.
   - Tap a verification task to open it and then tap **Scan**.

   You can scan multiple assets together. After you open a verification task, the verification task shows the number of assets that are verified, not verified, or expected to be verified. Click **Expected**, **Verified**, or **Not verified** to view the respective types of assets.

   Here is an example of a **Verification** tab that shows expected, verified, and not verified assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



3. Tap **Review** > **Submit**.
   A pop-up message appears and shows the successful verification of the scanned assets. The lists of verified and not verified assets are updated.
4. Once you scan all the assets, tap **Complete** to close the verification task.
   If there are still some assets left for scanning and you click **Complete**, then a pop-up window appears to confirm if you still want to close the task. If you tap **Complete**, the task is closed.
5. Enter the vendor details and the scheduled date by using your Hardware Asset Management instance.
   See Create a disposal order.
   After you enter the vendor details and close the Schedule Pickup task from your Hardware Asset Management instance, the **Departure** tab shows the list of departure tasks to process.
6. Scan and depart your assets in one of the following ways.
   - Swipe a departure task to the left.
   - Tap a departure task to open it and then tap **Scan**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can scan multiple assets together. After you open a departure task, the departure task shows the number of assets that are departed, not departed, or expected to be departed. Click **Expected**, **Departed**, or **Not departed** to view the respective types of assets.

7. Tap **Review** > **Submit**.
   A pop-up window appears and shows the successful departure of the scanned assets. The lists of departed and not departed assets are updated.
8. Once you scan all the assets, tap **Complete** to close the departure task.
   If there are still some assets left for scanning and you click **Complete**, then a pop-up window appears to confirm if you want to close the task. If you tap **Complete**, the task is closed.

Now Mobile app

Use the Now Mobile app to view the assets that are assigned to you, to report any issues with your assets, and to remotely receive new assets. Create incidents to report any issues with your assets to your IT department.

Download the Now Mobile app from Apple App Store or Google Play Store.

The Now Mobile app provides different services for tasks and requests.

To view all the assets that are assigned to you, navigate to **My Items** > **My Assets** > **Hardware**. The tab shows the assets that have the State field set to In transit or In use, Sub-state set to Reserved, and the Reserved to field set to your name. You can create an incident for an asset that is in use.

When you are away from your office, you can remotely receive an asset that is in transit. Scan the QR code for the asset tag so that you can automatically notify the IT department that you have received the asset.

Supported task types in the Now Mobile app

The Now Mobile experience deliberately surfaces a limited set of task types to avoid overly long, hard-to-filter task lists for mobile users. This design choice improves usability and performance on mobile devices.

The Now Mobile app includes the following asset task types in the **My Group tasks** view by default:

- Asset Receive Task
- Asset Drop-off Task
- Asset Pick Task
- Asset Repair Task
- Asset Troubleshoot Task
- Asset Evaluate Task

The following asset task types aren't available in the **My Group tasks** with the base configuration:

- Hardware Asset Reclamation Task
- Asset RMA Task
- Consume Asset Task
- Hardware Refresh Line Task
- Loaner Asset Task

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Additional asset task types on mobile

To display additional asset task types in the Now Mobile app **My Group tasks** view, you must configure each new task type using the Mobile App Builder. This customization requires you to create the following components for each task type:

- Create mobile form views for the task type
- Create screen navigation routes to direct users to the appropriate task form
- Create UI actions to support task operations

For guidance on using the Mobile App Builder to create custom mobile experiences, see Building mobile apps.

Asset Management Executive Dashboard

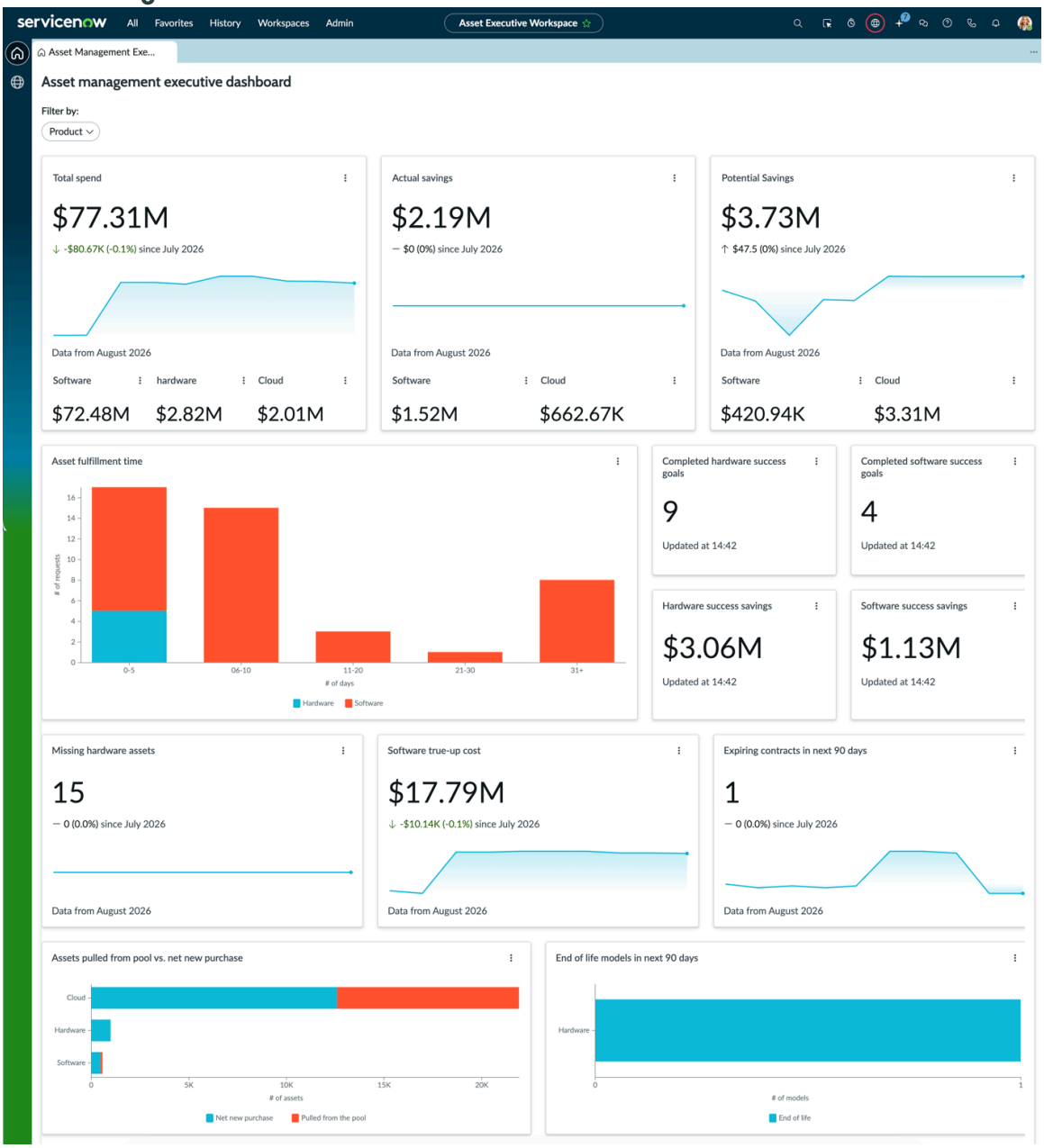
Use the Asset Management Executive Dashboard to gain visibility into critical KPIs for Hardware Asset Management, Software Asset Management, and Cloud Cost Management applications via a single dashboard.

To access the Asset Management Executive dashboard, you must either have Software Asset Management or Hardware Asset Management in your ServiceNow instance.

To view the Asset Management Executive dashboard, navigate to **Asset Executive Workspace** > **Asset Management Executive Dashboard**. A user with the role of sn_itam_common.asset_exec can access the dashboard.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard



You can filter the results in the dashboard by product, domain, or by both product and domain. If you filter by domain, the filter gets applied to all the widgets. If you filter by product, since some widgets are applicable for certain products, the filter isn't applied to all the widgets.

After you select a filter, a blue box gets displayed on the right side of each widget displaying one of the numbers:

- 0: Indicates that no filter is applied to a widget.
- 1: Indicates that only one filter is applied to a widget.
- 2: Indicates that both the filters are applied to a widget.

Note: To use the domain filter, you must activate the plugins: com.glide.domain.msp_extensions.installer and com.snc.pa.domain_support.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The schedule job, *Asset Management - Populate KPI aggregate table*, runs daily to update the data on the dashboard. To view the latest data for a widget, select the widget to display the list view page.

The dashboard widgets vary depending on the application plugins that you've activated in your instance. The widgets available with each application are listed in the following table:

Asset Management Executive Dashboard widgets

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
Total spend	Total cost of all entitlements for all products. Source table: License Metric Results [samp_license_metric_result].	Total cost of all hardware assets whose status is either **In stock**, **In use**, **In maintenance**,or **In transit** Source table: Hardware [alm_hardware].	Total active cost of all cloud resources. Source table: Spend Report Daily Aggregated Cost [sn_cld_spend_core_daily_aggregated_cost].
Actual savings	Total yearly savings for all products. This value is calculated as the total savings from closed complete reclamation candidates. Source table: Removal Candidate [samp_sw_reclamation_candidate].	Not applicable	This value is calculated as the monthly savings on cloud resources. **Note:** This widget gets displayed only if you have the Software Asset Management application installed on your instance. Source table: Cloud Insights Rightsizing Recommendation Automatics (sn_clin_core_rs_recommendation_automatic) where State = Completed.
Potential savings	Cost saved if removal candidates are reclaimed. Source table: Removal Candidate [samp_sw_reclamation_candidate].	Not applicable	Total of potential savings on a monthly basis on cloud rightsizing, cloud unused machines, cloud reservations, and cloud business hours. **Note:** This widget appears only if you have the Software Asset Management application installed on your instance. Source tables:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
			• Cloud Insights Rightsizing Recommendation Automatics [sn_clin_core_rs_recommendation_automatic]. • Cloud Insights Unused Recommendation [sn_clin_core_rs_unused_recommendation]. • Reserved Instance Recommendation [sn_clin_core_ri_recommendation].
Assessment fulfillment time	Fulfillment time bar graph of software requests from the Service Catalog. The graph shows the number of requests and the number of days taken to close those requests in the ranges of 0-5, 6-10, 11-20, 21-30, 31+ days. Source table: Asset fulfillment time [asset_fulfillment_time].	Fulfillment time bar graph of hardware requests from the Service Catalog. The graph shows the number of requests and the number of days taken to close those requests in the ranges of 0-5, 6-10, 11-20, 21-30, 31+ days. Source table: Asset fulfillment time [asset_fulfillment_time].	Not applicable
Completed software success goals	Number of success goals completed for the Software Asset Management application. Source table: SAM Success Goal [samp_success_goal]. **Note:** This widget is available only when the Software Asset Workspace (sn_sam_workspace) store application is installed.	Not applicable	Not applicable

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
Completed hardware success goals	Not applicable	Number of success goals completed for the Hardware Asset Management application. Source table: HAM Success Goal [sn_hamp_success_goal] **Note:** This widget is available only when Hardware Asset Management (sn_hamp) is installed.	Not applicable
Software success savings	Actual savings from completed success goals. Source table: SAM Success Goal [samp_success_goal]. **Note:** This widget is available only when the Software Asset Workspace (sn_sam_workspace) store application is installed.	Not applicable	Not applicable
Hardware success savings	Not applicable	Actual savings from completed success goals. Source table: HAM Success Goal [sn_hamp_success_goal]	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
		Note: This widget is available only when Hardware Asset Management (sn_hamp) is installed.	
Missing hardware assets	Not applicable	Count of missing, lost, or stolen hardware assets. Source table: Missing Hardware Assets [missing_hardware_assets].	Not applicable
Software true-up cost	Cost of the products actually being used. Source table: Product Results [samp_product_result].	Not applicable	Not applicable
Expiring contracts in 90 days	Count of software contracts that are going to expire in the next 90 days.	Count of hardware contracts that are going to expire in the next 90 days.	Not applicable

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
	Note: If the Software Asset Management application and the Hardware Asset Management application both exist in your instance, then this widget shows the total number of software and hardware contracts together; not individual contracts for software and hardware.	**Note:** If Software Asset Management and Hardware Asset Management both exist in your instance, then this widget shows the total number of software and hardware contracts together; not individual contracts for software and hardware.	
Assets pulled from pool vs net new purchase	Bar charts representing the number of requests for software assets being fulfilled from your inventory versus creating purchase orders for new assets. **Note:** Ensure that the Procurement (com.snc.procurement) plugin is activated in your instance to view software-related data for this widget. Source tables: • Pool assets: Assigned Allocations [alm_licenses_assigned].	Bar charts representing the number of requests for hardware assets being fulfilled from your inventory versus creating purchase orders for new assets. Source tables: • Pool assets: Consume Asset Task [consume_asset_task]. • Net new assets: Purchase order line items [proc_po_item].	Bar charts representing the number of assets used from your inventory versus new assets being procured via purchase orders. Source tables: • Pool assets: Spend Report Monthly Cost [sn_cld_spend_core_monthly_cost]. • Net new assets: Purchase order line items [proc_po_item].

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
	• Net new assets: Purchase order line items [proc_po_item].		
End of life models in next 90 days	Number of software models that are reaching their end of life in the next 90 days. • End of life • End of support • End of extended support Source table: Software Lifecycle Report [sam_sw_product_lifecycle_report].	Number of hardware models that are reaching their end of life in the next 90 days. • End of life • End of support • End of extended support Source table: Hardware model [cmdb_hardware_model_lifecycle].	Not applicable

Sustainable IT dashboard

The Sustainable IT dashboard helps you track the environmental impact of your IT assets and displays a variety of information to gauge the sustainability impact of the hardware assets of an organization easily.

You must install the Sustainable IT plugin (sn_esg_sustain) to view the Sustainable IT dashboard. For more information about the activating the Sustainable IT plugin, see Activate the Sustainable IT plugin.

To know more about the Sustainable IT dashboard data for your hardware assets, see Sustainable IT dashboard.

Analytics and Reporting Solutions for Hardware Asset Management

This Platform Analytics Solution contains preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

Enabling the Performance Analytics Solution

Use the Performance Analytics widgets on the dashboard to visualize data over time, analyze your business processes, and identify areas of improvement. With solutions, you can get value from Performance Analytics for your application with minimal setup.

Note: Solutions include some dashboards that are inactive by default. You can activate these dashboards to make them visible to end users according to your business needs.

For unlimited access to all features of this Platform Analytics Solution, purchase a Performance Analytics subscription. For more information, see Activating your Performance Analytics subscription.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To use this Analytics and Reporting Solution, you must be entitled to use Performance Analytics with Hardware Asset Management . For more information about entitlements to Performance Analytics, see Activating your Performance Analytics subscription

This Out-of-the-box Performance Analytics Solution is available from the ServiceNow Store. To enable this solution, an admin navigates to **System Applications** > **Search ServiceNow Store**. When the landing page for the ServiceNow Store opens, search for Hardware Asset Management . When you have found the Solution, follow the instructions in the Store. The ServiceNow Store has its own documentation.

Domain separation and 'Run As' user

In some solutions, System Administrator is the **Run As** user for data collection jobs in the Platform Analytics Solutions. In other solutions, the **Run As** user for data collection jobs is left blank. Verify that the **Run As** user exists on the instance, and that this user has the appropriate level of access. An inappropriate **Run As** user can cause errors or limit the data that is collected. This setting only has an effect if domain separation is enabled.

Performance Analytics dashboards for Hardware Asset Management

Important: You can access the Core UI Performance Analytics dashboards only if you have upgraded from prior releases to Xanadu. Beginning with the Xanadu release, the Core UI Performance Analytics dashboards aren't available to new users of Hardware Asset Management.

The Performance Analytics dashboards available for Hardware Asset Management are the following:

- Hardware Asset Dashboard
- Hardware Normalization Dashboard
- My Assets
- Procurement Overview
- Asset Contract Overview
- Asset Overview

Beginning with the Xanadu release, note the following points about the Core UI Performance Analytics dashboards:

- The Procurement Overview and Asset Contract overview module links are redirected to Hardware Asset Workspace.
- The following Next Experience Platform Analytics dashboard versions of the Asset Overview and My Assets Core UI Performance Analytics dashboards are available:
  - Analytics Overview: You can access this dashboard by navigating to **Asset** > **Analytics Overview**.
  - My Assets Analytics: You can access this dashboard by navigating to **Self-Service** > **My Assets Analytics**.

Note: After upgrading to Xanadu, you can view both the Core UI Performance Analytics dashboards and the Next Experience Platform Analytics dashboards for Hardware Asset Management. While migrating the Core UI Performance Analytics dashboards to the Next Experience Platform Analytics dashboards, auto-migration is disabled by default to avoid duplicate dashboards.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Activate your Performance Analytics subscription

Hardware Asset dashboard

View the key metrics on your hardware and consumable models and assets for the entire asset life cycle in the Hardware Asset dashboard.

Important: You can access the Hardware Asset dashboard only if you have upgraded from prior releases to Xanadu. Beginning with the Xanadu release, the Hardware Asset Dashboard isn't available to new users of Hardware Asset Management.

Access the Hardware Asset dashboard by navigating to **Asset** > **Hardware Asset Dashboard**.

The results in all the tabs in the Hardware Asset dashboard are updated in real time. Only the reports that display data in the **Lifecycle Overview** sections is updated daily based on scheduled jobs. You can save charts in PNG or JPEG formats for sharing or viewing them locally.

End user and roles

End user and goal	Required role	Benefits
Asset Manager must see patterns in the data all through the asset life cycle.	asset	View reports that provide critical insights on assets such as procurement needs, inventory, and end of life status. You can also view the normalization status and life-cycle overview for hardware and consumable models.

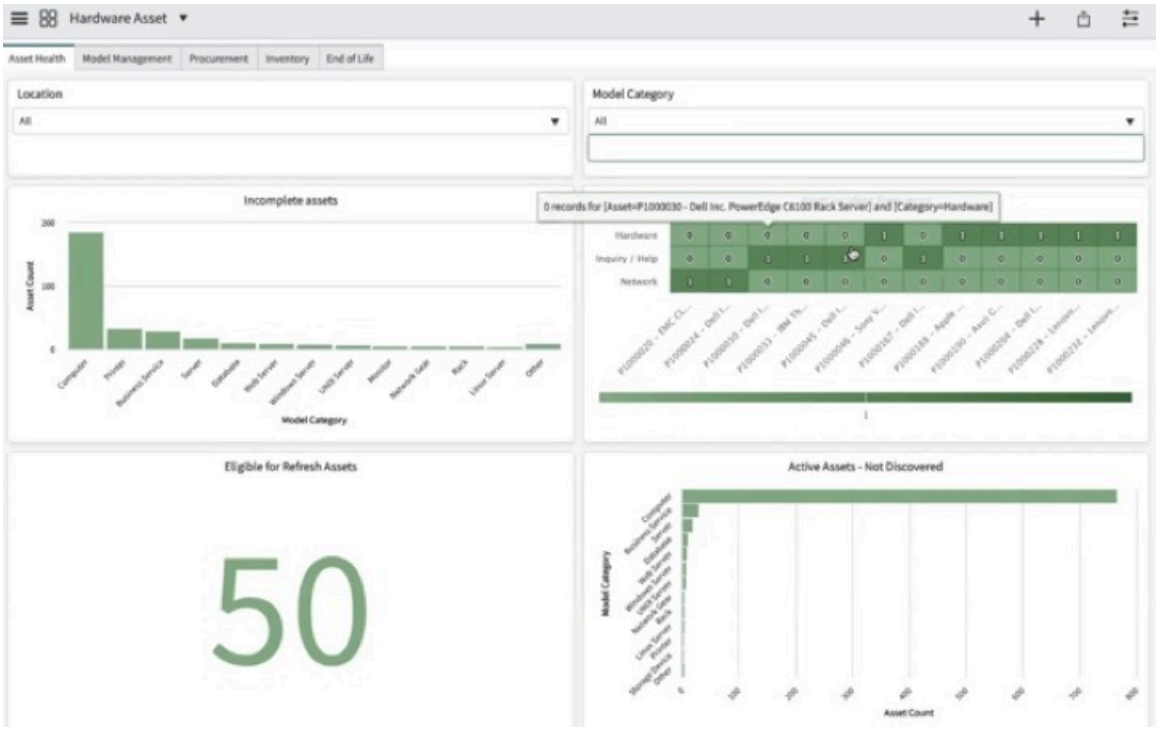
Asset Health tab

This tab gives you an overview of hardware and consumable models that are missing purchase information, undiscovered over a period one month of missing, scheduled for retirement, or reported with most incidents. Use Location and Model Category filters to view asset health reports of particular location and model respectively.

Report	Source table	Description
Incomplete Assets	Asset [alm_asset]	Asset models without purchase order number, purchase order line, or receiving line.
Eligible for Refresh Assets	Hardware [alm_hardware]	Asset nearing end of life and which are eligible for refresh.
Asset incident Frequency	Incident [incident]	Assets that have been reported with frequent incidents.
Active Assets - Not Discovered	Asset [alm_asset]	Assets that aren’t discovered at all or not discovered within one month.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Health tab



Model Management tab

This tab gives you an overview of hardware and consumable models that are reaching their end of life. You can also view the normalization status, life-cycle overview, and information on the content service library. You can effectively manage your models by viewing their end of life status on a monthly, quarterly, or yearly basis.

Report	Source table	Description
Hardware Models up for End of Life	Hardware Model Lifecycle [cmdb_hardware_model_lifecycle]	The beginning phase of the end of life for hardware models. Shows the count of hardware models whose start date of the end of life phase is either the current month, quarter, or year. **Note:** Only hardware model life cycle records that are active, model status is in production, and life cycle type is Publisher appear in **This month**, **This quarter**, or **This year**.
Normalization Status	Hardware Product Model [cmdb_hardware_product_model]	Normalization status of all the hardware models. View the count of hardware models that were normalized and those models that didn't get normalized.

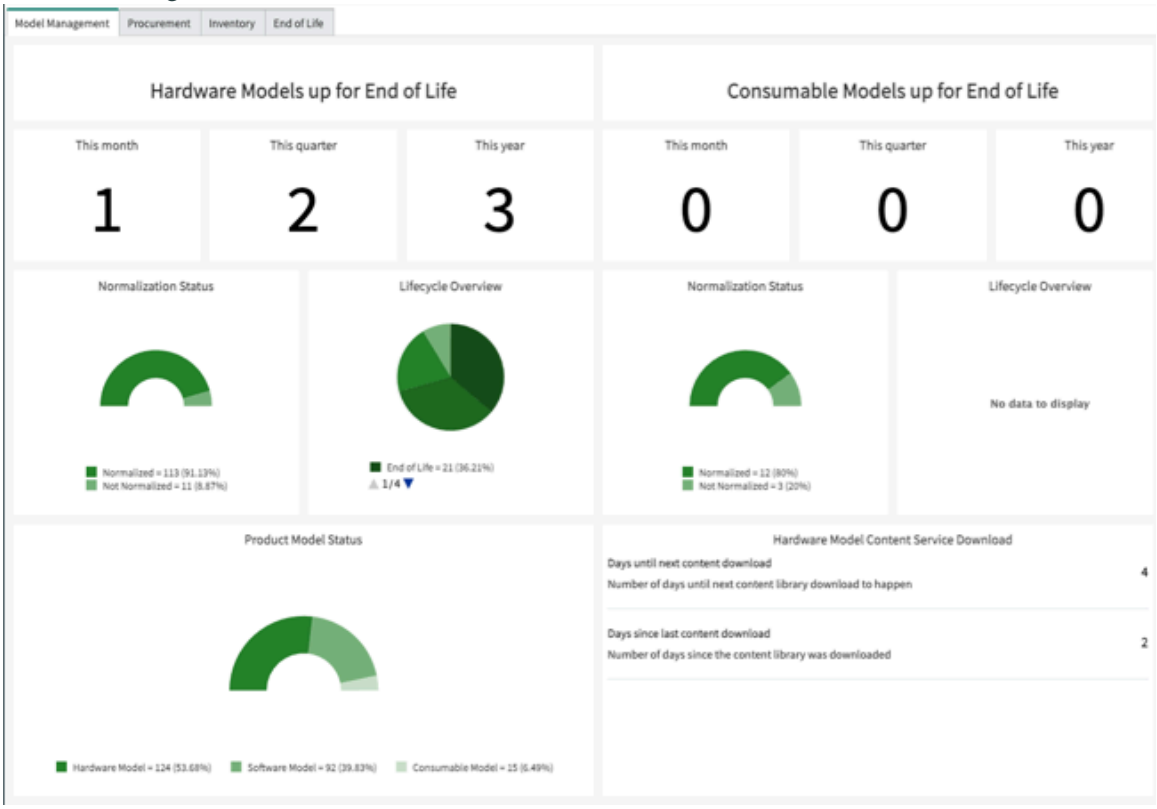
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source table	Description
		You can further drill down to view the status of the normalized models: Manually Normalized, Manufacturer Normalized, or Partially Normalized. You can drill down to view the status of non-normalized models too: New and Match Not Found.
Lifecycle Overview	Hardware Model Lifecycle [cmdb_hardware_model_lifecycle]	The count of hardware models that are present in each life cycle stage: General availability, end of support, end of extended support, and end of sale.
Consumable Models up for End of Life	Consumable Model Lifecycle [cmdb_consumable_model_lifecycle]	The beginning phase of the end of life for consumable models. Shows the count of hardware models whose start date of the end of life phase is either the current month, quarter, or year. **Note:** Only consumable model life cycle records that are currently active, model status is in production, and life cycle type is Publisher appear in **This month**, **This quarter**, or **This year**.
Normalization Status	Consumable Product model [cmdb_consumable_product_model]	Normalization status of all the consumable models. You can view the count of consumable models that were normalized and those that didn't get normalized. You can further drill down to see the status of the normalized models: Manually Normalized, Manufacturer Normalized, or Partially Normalized. You can drill down to view the status of non-normalized models too: New and Match Not Found.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source table	Description
Lifecycle Overview	Consumable Model Lifecycle [cmdb_consumable_model_lifecycle]	The consumable models that are present in each life-cycle stage: General availability, end of support, end of extended support, and end of sale.
Product Model Status	Product Model [cmdb_ model]	Current count of hardware, consumable, and software models based on the status of the models. Drill down on a model to view the status of that model. For example, click hardware models on the chart to see the status of all the hardware models: In Production, Retired, or sold.
Hardware Model Content Service Download	CDS table [cds_client_schedule]	The days since the content service library was last downloaded on your instance and the days remaining for the next download to take place.

Model Management tab



Procurement tab

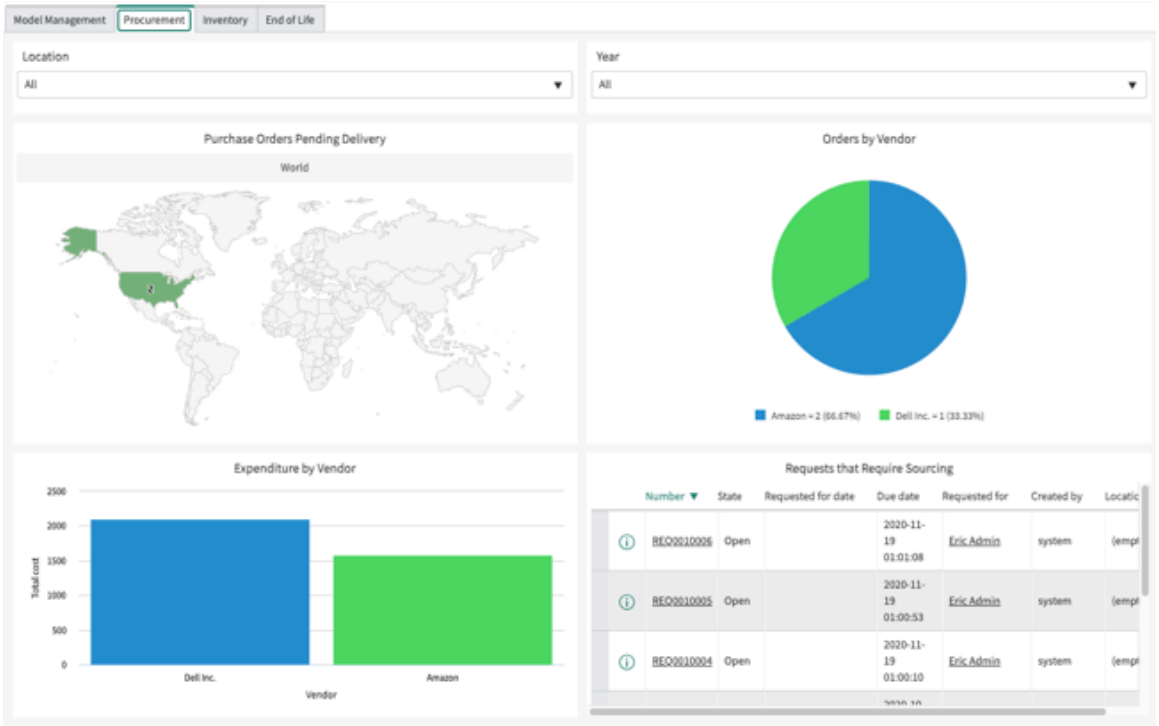
This tab gives you a view of the purchase orders for hardware assets that are pending delivery worldwide. You can also view purchase orders that haven't yet been sourced and information relating to cost of purchase orders per vendor. You can filter the results in this tab by location and year.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source table	Description
Purchase orders pending delivery	Purchase Order [proc_po]	Purchase orders which aren't yet received or canceled. Only purchase orders that have a status of ordered or pending delivery are displayed. **Note:** The asset, procurement_user, inventory_admin, or contract_manager role can only access the Purchase Order [proc_po] reports.
Expenditure by Vendor	Purchase Order [proc_po]	The cost that you've paid to each of your vendors for procuring the inventory. Only purchase orders that have a status of ordered, pending delivery, or received are displayed. **Note:** The asset, procurement_user, inventory_admin, or contract_manager role can only access the Purchase Order [proc_po] reports.
Orders by Vendor	Purchase Order [proc_po]	Purchase orders that are ordered, pending delivery, or received. **Note:** The asset, procurement_user, inventory_admin, or contract_manager role can only access the Purchase Order [proc_po] reports.
Requests that Require Sourcing	Request [sc_request]	Requests that haven't yet been addressed. Requests for which either a purchase order or a transfer order hasn't been initiated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procurement tab



Inventory tab

This tab shows data regarding your open stock orders. You can also view information about active stock rules, open transfer orders, and requests sourced through stock. You can filter the results in this tab by location and stockroom.

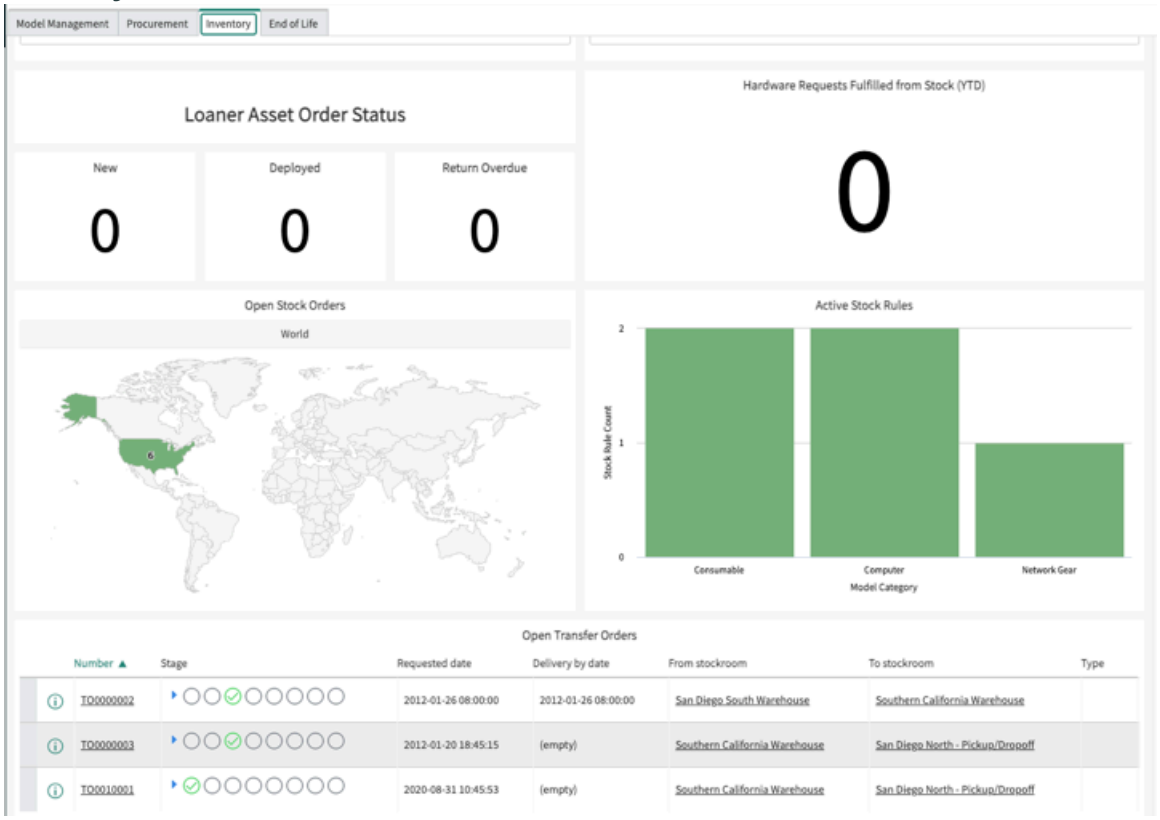
Report	Source table	Description
Hardware Requests fulfilled from Stock (YTD)	Transfer Order [alm_transfer_order]	Requests sourced through stock in the current year. **Note:** The inventory_user, asset, or procurement_user role can only access the Transfer Order [alm_transfer_order] reports.
Open Stock Orders	Requested Item [sc_req_item]	All the stock orders which haven't yet been fulfilled. The open stock orders can be viewed as numerical data geographically.
Active Stock Rules	Stock Rule [alm_stock_rule]	Count of active stock rules grouped by model category. If a model of an item that has an active stock rule falls below the threshold value, a new order is placed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source table	Description
Open Transfer Orders	Transfer Order [alm_transfer_order]	Transfer orders not yet delivered or canceled. **Note:** The inventory_user, asset, or procurement_user role can only access the Transfer Order [alm_transfer_order] reports.
Open Audit Assets	Asset Audits [sn_hamp_asset_audit]	Audits that are currently new or in progress. **Note:** The asset or inventory_user role can only access the Asset Audits [sn_hamp_asset_audit] reports.
New Hardware Assets Found by Audits	Asset [alm_asset]	The distribution of categories the assets belong to for audits conducted in the last year.
Loaner Asset Order Status	Loaner Asset Order [sn_hamp_loaner_asset_order]	Number of Loaner Asset Orders that are new, deployed, and the ones that are overdue for return.
Open RMA Request Lines	RMA Request Line [sn_hamp_rma_request_line]	List of all the open RMA request lines. **Note:** The asset, itil, or inventory_user role can only access the RMA Request Line [sn_hamp_rma_request_line] reports.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inventory tab



End of Life tab

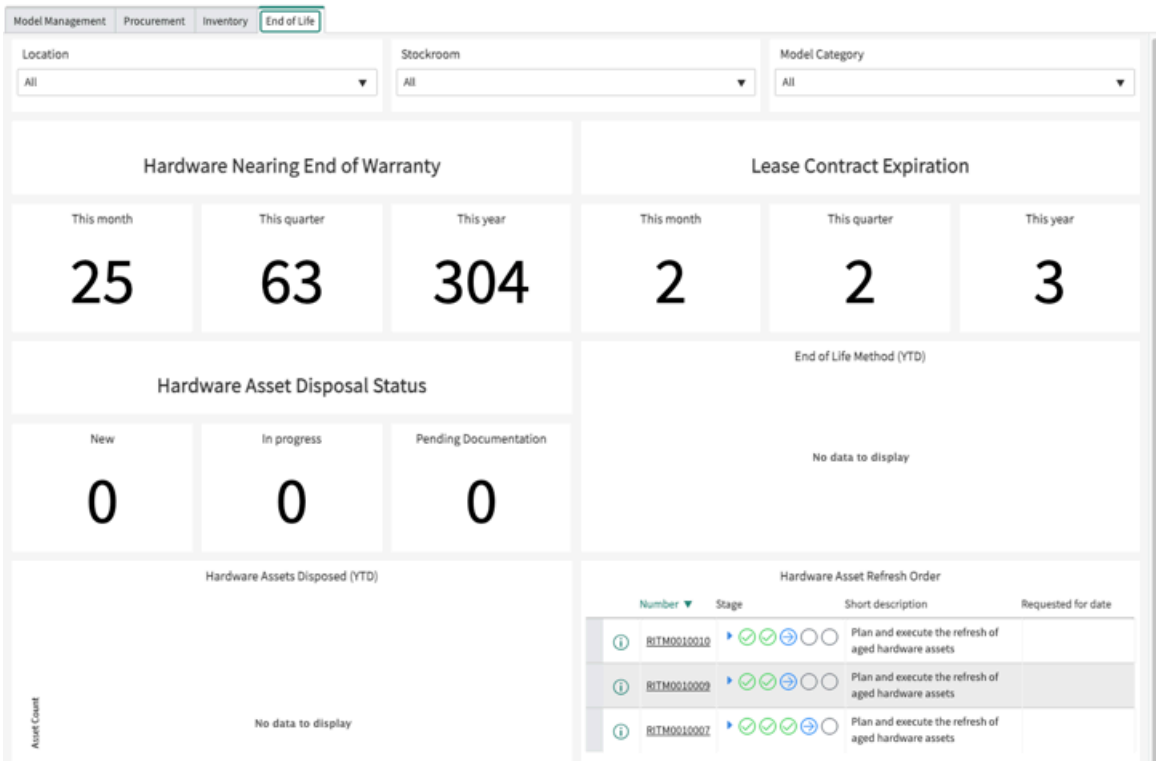
View this tab to monitor your assets that are approaching their end of life stage and the disposal status of your assets. You can filter the results in this tab by location, stockroom, and model category. The Model category filter doesn't apply to **Hardware Asset Disposal Status**.

Report	Source table	Description
Hardware Nearing End of Warranty	Asset [alm_asset]	Hardware and consumable assets whose warranty expiration date falls in the current month, quarter, or year. **Note:** Only assets that are in the following states appear. • in stock • in transit • in use • in maintenance • consumed
Hardware Asset Disposal Status	Hardware Disposal Order [hamp_hardware_disposal]	Status of requests created for hardware assets disposal. The count of new requests appears in **New**. The count of all hardware disposal requests that are currently

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source table	Description
		in scheduling, transit, and confirmation stages are listed under **In progress**.**Pending Documentation** shows all the disposal requests that are in the Documentation stage.
Hardware Assets Disposed (YTD)	Asset [alm_asset]	Hardware and consumable assets, based on model category that have been disposed in the current year.
End of Life Method (YTD)	Asset [alm_asset]	Count of hardware and consumable assets that are retired, based on their substates. A hardware asset in a retired state has many substates (disposed, none, sold, vendor credit, and pending disposal).
Lease Contract Expiration	Contract [ast_contract]	Hardware and consumable assets whose lease expiration date falls in the current month, quarter, or year. It shows only the active contracts.
Hardware Asset Refresh Order	Requested Item [sc_req_item]	A list of Hardware Asset Refresh ordered.

End of Life tab



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Product Instance feature in Hardware Asset Management

You can consistently represent a product along all applications, processes, workflows, and user interactions through the Product Instance feature. Changes made to any of the product representations are synchronized automatically.

The Product Instance feature enables you to have a common representation for any product tracked as an asset in IT Asset Management, an install base item (IBI) in Customer Service Management (CSM), and a configuration item in Configuration Management Database (CMDB). A Product Instance is associated with assets of a particular model category.

Note: Product Instance is currently enabled only for the Medical device model category.

Product Instance Identifier (PID) configurations for a model category

Product Instance Identifier (PID) is a unique identifier for a Product Instance and links asset, CI, and IBI.

A PID is generated based on the following items defined in the Product Instance Identifier Configurations [product_instance_identifier_configuration] table:

- PID configurations
- Order assigned to each configuration

Note: PID configurations out-of-the-box can't be edited and are read-only.

Note the following about PID generation:

- If the fields specified in the parameters of PID configurations are empty, a PID isn't generated and the asset isn't created.
- Assets that are in the On order or Pre-allocated state and don't have a serial number won’t have a PID generated.
- The PID is recalculated and regenerated whenever changes are made to the fields specified in the PID configuration parameters, for example, updates to the serial number of an asset, CI, or IBI.

Note: The PID is stored in the product_instance_id field of the Asset [alm_asset], Configuration Item [cmdb_CI], and Install Base Item [sn_install_base_item] table.

For the medical device model category, the default parameters of a PID configuration are based on the **Serial number**, **Parent**, and **Model Component ID** fields of the table. The PID configuration based on the item's serial number is given the highest priority when generating a PID. But when the serial number isn’t present, the parameters based on the Parent and Model Component ID fields are considered for generating the PID. If you specify an existing serial number, the PID that is generated would be a duplicate of an existing PID, so the asset isn’t created. If you have any customizations, such as using a different custom field instead of the Serial Number as a unique identifier, you should deactivate the Serial Number PID configuration and create a new PID configuration for that custom field.

Note: To enable PID recalculation for child assets when updates are made to the parent asset, set the system property *sn_itam_enable_pid_recalculation_for_child_asset* to true. The default value is false.

PID synchronization between an asset, CI, and IBI

Synchronization of PID between an asset, CI, and IBI happens in the following circumstances:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Any of the fields of the PID is updated on an asset, CI, or IBI
- An asset, CI, or IBI is with values specified in the fields of the PID configuration parameters.

Create or update assets

When you create an asset by specifying a value for a field included in the PID configuration parameter, based on the PID configuration of the associated model category, the following actions occur:

1. A PID is generated for the asset based on the field value that you specified.
2. The asset is created.
3. The PID of the asset is synchronized with the associated CI.

When you update the field included in the PID configuration parameter of an asset, the PID is recalculated and regenerated based on the new field value. The updated PID of the asset is then synchronized with its associated CI.

Create or update a CI

When you create a CI, a PID is generated only when the asset is created for that CI. The PID of the asset is then synchronized with the CI.

When you update a field included in the PID configuration parameter on a CI, the following actions occur:

1. The field value is copied from CI to the asset.
2. The PID is recalculated and regenerated for the asset.
3. The PID of the asset is synchronized with the associated CI.

Create or update an IBI

When you create an IBI by specifying a field included in the PID configuration parameter, an asset and the associated CI are created. The PID is generated on the install base item and is synchronized with the asset and its associated CI.

A PID is regenerated and synchronized when any updates are made to the fields of the IBI that are part of the PID configuration parameters.

Asset life-cycle automation

Automate the update of your asset records throughout its life cycle and remove the effort of manually maintaining asset accuracy.

Assets must be updated and tracked from the time they’re purchased until they’re disposed. The automation process starts from the time that you request an asset through determining if the asset is in stock or if it must be purchased. If it's in stock, then the asset is transferred through the transfer order workflow. If the asset must be bought, then the purchase order workflow is triggered. The automated workflows take away the need to update manually each asset record or the associated configuration item (CI). After the workflow is complete, the asset records or CIs are automatically updated.

Note: The automated workflow isn't triggered for excluded assets. You must manually update your asset records or CIs for the excluded assets.

You can create bulk stock orders for hardware assets for your stockrooms. You can specify the model and the exact quantity you need. After the item is procured or transferred, the workflow is complete.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can also create disposal orders for hardware and consumable assets. This workflow guides you through five asset disposal tasks. These tasks involve the planning, scheduling, verification, departure, and the final confirmation of the disposed assets. Closing a task completes the task and creates the next task in the workflow.

For example, Verify is the first task in the asset disposal workflow. After you complete and close the Verify task, the Schedule pickup task is automatically created. This process continues until you close all the tasks required for disposing the asset. For information, see Hardware disposal order stages.

Asset tasks

Asset tasks are provided for deploy, replace or swap, or retirement operations for your assets. These tasks automatically update the CI/asset record on the completion of these operations.

If an asset is being deployed, replaced, or retired via an incident, change request or a field service work order, the CI/asset record is automatically updated along with the related records for the CI/asset. For example, you have a change ticket to retire a server. After the change is implemented, the Change Management application triggers the retire asset event. The retire task is triggered and updates the following:

- CI
- related asset record
- software allocations
- maintenance contracts

The data accuracy is improved by reducing the need for manual intervention to update records.

When an asset is retired or swapped via an incident, the Stockroom field is populated based on the location of the asset. If there isn't any stockroom in the location of the asset, then the Stockroom field isn't populated. However, if the asset location is supported by multiple stockrooms as part of service locations, then the Stockroom field is automatically populated with details of the supporting stockroom based on the priority. For more details on service locations, see Associate a stockroom with service locations.

This table lists the asset tasks available in each application.

Application	Asset Tasks
Incident Management	• Update/Repair • Swap • Retire

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Application	Asset Tasks
	Note: By default, asset action is required for closing incidents. If you don't want to enforce any asset action for the closure of an incident, you can set the value of the system property *sn_hamp.enable_asset_action_validation_i* to **false**. For more details see, the Not able to resolve incident or change request after installing HAMP - mandatory field Asset action [KB1695540] article in the Now Support Knowledge Base.
Change Management	• Deploy • Retire **Note:** By default, asset action is required for closing change requests. If you don't want to enforce any asset action for the closure of a change request, you can set the value of the system property *sn_hamp.enable_asset_action_validation_c* to **false**. For more details see, the Not able to resolve incident or change request after installing HAMP - mandatory field Asset action [KB1695540] article in the Now Support Knowledge Base.
Field Service Management	Deploy

Hardware Model Normalization

Asset Management Hardware Model Normalization enables you to normalize the details, such as manufacturer, product, model, and device type, of your hardware and consumable models. Data from the models is compared against the data in the Hardware Model Normalization Content Service.

The Hardware Model Normalization (com.sn_hwnorm) plugin is activated when you activate the Hardware Asset Management [sn_hamp] plugin.

For more information about the process of normalizing hardware and consumable models, see Normalize hardware and consumable models.

Note: This documentation is for Hardware Model Normalization. For additional information on Asset Management, see the Asset Management documentation.

Scheduled jobs

To standardize your hardware and consumable models, the asset data must be normalized. You can manually update the model records with the normalization content, or you can compare your data against the Hardware Asset Management Content Service.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The *HAM- Hardware Normalization* scheduled job runs daily. This job doesn't add, remove, or merge models, nor does it modify the original fields like Model Name, Manufacturer, or Model Number. It only updates the normalization-related fields for existing models, such as Normalized Product, Normalized Manufacturer, Normalized Model, and so on.

Content from the Hardware Model Normalization Content Service is pulled into the ServiceNow AI Platform. Use the Asset Job Log (asset_job_log) table to review the status of the scheduled job.

The normalization status of models can be reverted by selecting **Revert Normalization** on the model. Any normalization that occurred on the model gets reverted and the rule gets deactivated. When the scheduled job runs, the models are processed with the active rules and the status is updated. For more information about reverting normalization, see Revert normalization of hardware and consumable models.

Note: The Domain Asset Process Settings table (alm_domain_asset_process_setting) stores configurations for asset processes, including the normalization of hardware models. By default, normalization is performed only for models within the TOP/Default domain. However, if you have the asset or domain_admin role, you can enable normalization for hardware models in any domain. To enable normalization for a specific domain, follow these steps:

1. Navigate to the Domain Asset Process Settings table (alm_domain_asset_process_setting).
2. Locate the specific domain for which you want to enable normalization of models.
3. Set the **Run asset process** field to **true**.

When the scheduled job runs the next time, the hardware models of that domain are normalized.

Important: By default, hardware models that belong to a model category associated with an opted-out HAM resource category are excluded from HAM workflows. Therefore, such hardware models don't go through Hardware Model Normalization. However, when the OT Asset Management application is activated on your ServiceNow instance, any hardware model of an opted-out HAM resource category with a minimum of one Operational Technology (OT) asset also goes through Hardware Model Normalization. The **OT entity** flag on the asset indicates whether it's an OT asset. For more information on OT assets, see OT Asset Workspace.

You can also revert the normalization status of the hardware models with OT assets.

The scheduled job generates hardware and consumable model reports. These reports identify the overall status of your models and provide a breakdown of the normalization status.

The following reports are included.

- Hardware Product Overall Normalization Status
- Consumable Product Overall Normalization Status
- Hardware Model Normalization Status
- Consumable Model Normalization Status

Related topics

Configure Hardware Model Normalization

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware Asset Management flow customization

Customize the flows in some of the Hardware Asset Management features by using the available decision tables.

You can also create a flow using Workflow Studio that suits your requirement. You can then customize the existing flows by using the newly created flow in the readily available decision tables. For example, in the Hardware Refresh module, you can remove an existing flow, add a new flow or a condition.

Update the associated Decision table entries to trigger the new flow. For more information, see Update associated Decision tables for HAM flows.

For the list of readily available decision tables and the associated Hardware Asset Management features that you can update, see Decision tables for Hardware Asset Management flows.

Return Merchandise Authorization

Return Merchandise Authorization (RMA) is an agreement between a buyer and seller that lets the buyer return or replace a faulty product. The Asset RMA Order catalog item has prescriptive flows to streamline the RMA process.

An RMA request has RMA request lines. When an RMA request is submitted, an RMA request line is created for each asset and consumable that was selected. You can view a list of all the open RMA request lines in the Hardware Asset Dashboard. For details, see Hardware Asset dashboard.

Workflow for Return Merchandise Authorization

The Flow Designer application creates RMA tasks for every RMA request line. The RMA request is completed through the RMA tasks. An Assessment task is created for each RMA request line. The Assessment task is used to assess the faulty asset. When the state of an RMA task is updated, the **Stage** field on the RMA request line form is updated by default.

When you receive a defective product or if a product becomes defective within its warranty period, you can request an Asset RMA Order. Based on your agreement with the vendor, you can decide to repair the faulty asset either on-site or off-site. On the Assessment task form, when you select off-site repair, the flow designer triggers the Asset RMA Off-site flow. The Asset RMA Off-site flow generates the following RMA tasks to complete the RMA process.

- Shipment
- Vendor RMA decision
- Receive

On the Assessment task from, when you select on-site repair, the flow designer triggers the Asset RMA On-site flow. The Asset RMA On-site flow generates the RMA task (On-site repair task) to complete the RMA process.

After attempting an on-site repair, if the faulty asset couldn't be repaired, then you can send the product for an off-site repair. If you want to send the faulty product for an off-site repair, then the Asset RMA Off-site flow is triggered and the RMA process is completed through the Asset RMA Off-site Flow RMA tasks.

You can cancel an RMA request as long none of the assessment tasks are closed for any of the RMA request lines. After an RMA request is canceled, all the associated RMA request lines and RMA tasks are canceled. If you submit RMA for an asset that is part of an existing RMA, the RMA request lines of the existing RMA request are automatically canceled. If an RMA task is canceled, the associated RMA request line is also canceled. If you have the inventory user or itil role, you can cancel an Assessment task, Internal repair task, or a Shipping task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Manage RMA requests

Integrating Zebra technology RFID system

Integrating a Zebra technology Radio Frequency Identification (RFID) system with your ServiceNow instance enables you to identify#, track, and manage your hardware asset locations automatically.

After the asset integration with Zebra technology RFID system is successful, you can view the RFID Tag information such as zone group, zone, and locations mapped with your assets. The RFID information is mapped to the Asset [alm_asset] table according to the serial number of the asset. For more information about the Asset management tables, see Installed with Base Asset Management.

Note: If the asset is excluded, the RFID information isn't mapped to the Asset [alm_asset] table according to the serial number of the asset. For more information about asset exclusion, see Hardware Asset Management license exclusion.

The data from the Zebra technology RFID system is imported to ServiceNow regularly. Any data change in the RFID system is updated in your ServiceNow instance.

The RFID asset [rfid_asset] table stores the RFID information of assets. For more information about viewing the RFID information, see View RFID information of assets.

Asset bundles

Asset bundles help you bundle a group of assets, already in your inventory, as a single entity.

An asset bundle comprises consumable and hardware assets.

Example of a developer asset bundle

Component	Model category
Apple MacBook W9576XA	hardware asset
Samsung monitor B2156C	hardware asset
Logitech mouse PB567VT	consumable
Apple keyboard MT65021R	consumable

Asset bundles are based on bundled models. A bundled model is a grouping of models. For more information on bundled models, see Bundled models.

Existing assets from stockrooms are used to create an asset bundle. Only assets that are in the **In stock** status and **Available** substatus are added to an asset bundle. If you want to exclude any assets, you must remove the asset from the bundle. For more information about asset exclusion, see Hardware Asset Management license exclusion. Assets that are part of an asset bundle aren’t available as individual assets. No CIs are associated with an asset bundle.

An asset bundle goes through the entire asset life cycle. From building an asset bundle, allocating the bundle to a user, moving it to a state of maintenance if assets need repair, and finally retiring the bundle when its purpose is fulfilled.

Asset bundles can be transferred between stockrooms. However, individual assets within a bundle can't be transferred between stockrooms. Assets within a bundle can't be disposed. After an asset bundle is retired, the assets are disassociated from the bundle and can be individually disposed. Deleting an asset bundle moves all assets belonging to the bundle to a stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can swap assets belonging to an asset bundle. Assets can be swapped when the state of the bundle is **In maintenance** or **In stock** and substate **Pending repair**.

You can retire an asset bundle and release all the assets belonging to the bundle. The assets that are released are returned to a stockroom and you can delete the bundle.

Assets belonging to a bundle are excluded from sourcing, transfer orders, and disposal orders flows.

Important: Asset reclamation supports hardware and consumable assets. Asset bundles and pallets aren't supported by default and require customization of the reclamation flow and request to handle these asset classes.

For more information on creating asset bundles, see Manage asset bundles from your inventory.

Asset reclamation

Reclaim Asset catalog item integrates Asset Management module with HR module to let you efficiently reclaim assets.

When an employee leaves an organization or moves to a different role, reclaiming the assets assigned to the employee is a troublesome task and needs much coordination between the HR professional and the asset manager. The Reclaim Asset catalog item has prescriptive workflows to efficiently reclaim hardware assets and store them in the inventory, reassign, send it for repair, or dispose of as required.

An HR professional, manager, or employee can submit an asset reclamation request using the Reclaim Asset catalog item. A manager can submit an asset reclamation request for the reporting members. An HR professional can submit an asset reclamation request for any employee in the organization. An employee other than an HR professional and a manager can submit an asset reclamation request for self. For more information, see Submit an asset reclamation request.

Important: Asset reclamation supports hardware and consumable assets. Asset bundles and pallets aren't supported by default and require customization of the reclamation flow and request to handle these asset classes.

When you create a Reclaim Asset request via Service Catalog, an Asset Reclamation Request is created. For each hardware or consumable assigned to the departing employee, a Hardware Asset Reclamation Line is created for the assets you select in the Reclaim Asset Service Catalog. Each Hardware Asset Reclamation Line is closed through the following Hardware Asset Reclamation Tasks:

- Schedule drop off, Schedule pickup, or Schedule shipment task based on which reclamation method you select in the Reclaim Asset form
- Receive asset
- Evaluate

The Hardware Asset Reclamation Line also has a stage field, which changes when you close a Hardware Asset Reclamation Task as follows:

- Ready
- Pending receive
- Pending evaluation
- Complete

For more information, see Close an asset reclamation request.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Hardware Asset Reclamation Sub Flow decision table enables you to trigger your custom reclamation sub flow for hardware and consumable assets. Based on the condition related to the asset that you specify in the decision table, the corresponding sub flow is triggered, and the reclamation process completes.

To use Service Catalog Request, you must install SAM Professional or HAM Professional. If you have installed only SAM Professional, you can access the Service Catalog, but only the Software Asset Reclamation flow gets triggered.

Asset donation

You can easily donate hardware and consumable assets in stock in your organization to charity organizations through an Asset Donation Order.

The Asset Donation flow handles the various stages in the asset donation process. After you submit the Asset Donation Order, the asset manager reviews the asset donation order and, if it is approved, processes the donation. The asset donation process completes when the charity organization acknowledges the delivery of the assets.

Note: You can't donate excluded assets. For information on excluded assets, see Hardware Asset Management license exclusion.

For more details on asset donation, see Donate assets to charity organizations.

Pre-allocated assets

Pre-allocated assets are often assets that the vendor still owns, but has agreed to store in a customer stockroom for just-in-time procurement.

A pre-allocated asset physically exists, but isn’t yet a financial liability. For example, a pre-allocated asset could be a pallet of 100 computers ready to be allocated. Allocating the asset generates a configuration item (if required by the category) and enables you to assign the asset. Pre-allocated assets can be components of another asset that is already in use.

For example, pre-installed, pre-allocated servers can be set up in server racks next to production servers, but the pre-allocated servers only become a financial liability after they’re turned on. The pre-allocated option can only be used for assets, not for consumables or licenses. Pre-allocated assets can’t be composed of bundles.

Note: Warranties aren’t active until an item is installed. Therefore, until an asset is allocated and assigned, it isn’t under warranty.

You can create a pre-allocated asset, allocate the assets from pre-allocated asset records, and also split a pre-allocated asset to create a group that can be moved to a different stockroom. For more information, see Manage pre-allocated assets.

Pallet assets

Use the Pallet asset class to track and manage assets in your inventory as a group. You can easily move a group of assets between locations or dispose of them as a group.

A pallet is an asset with the model category Pallet. Pallets are the parent of the assets contained in them. The predefined pallet types are pallet, bin, box, and container.

Note: The Pallet asset class with its associated UI options are available only with the Hardware Asset Management Professional plugin (com.sn_hamp).

You can create a pallet asset and add base, hardware, bundle, consumables, and other pallet assets to the pallet in the Asset Estate view.

Pallet assets aren't associated with any expense lines.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Pallet [alm_pallet] table stores information about pallet assets. The location of a pallet in the stockroom is indicated by the **Aisle** and **Space** columns of the Asset [alm_asset] table.

Note the following when you plan to use pallet assets for inventory management:

- You can't add software, enterprise, and excluded assets to a pallet.

  Note: For information on excluded assets, see Hardware Asset Management license exclusion.

- You can't add an asset that is already associated to a parent asset.
- Pallet assets can't be a part of asset bundles.

For more details on pallet assets, see Manage your inventory through pallet assets.

Loaner assets

Request a loaner asset or consumable when you need it for a short period of time.

A loaner order request is completed through the following stages:

- Prepare task: Prepare the loaner asset such as by installing the required software before handing over the loaner asset to the requested user. By default, the Prepare task is created two days before the start day. You can change this setting by modifying the *`Number of days required for preparing the loaner asset`* variable on the Loaner Asset Request catalog item.

  Note: The *`Number of days required for preparing the loaner asset`* variable is not shown on the catalog form when you request a loaner asset. To find this variable, go to the Catalog Item module. Only users with the catalog_admin role can change the value of this variable.

- Deploy task: Hand over the loaner asset to the requested user or install the loaner asset at the user's machine. The Deploy task is created after the Prepare task is closed.
- Reclaim task: Reclaim the loaner asset after a period of time. The Reclaim task is created one day before the return day.

Note:

Loaner assets are not counted in the stockroom count when stock rules are being processed.

You can't allocate an excluded loaner asset. For more information, see Hardware Asset Management license exclusion.

Related topics

Manage loaner assets

Loaner asset reservation

Waitlisted loaner orders give visibility to future demands for loaner asset.

With the available loaner assets, the user who submits a loaner order first gets the loaner asset. Loaner assets are automatically assigned to the users by a daily scheduled job on the Preparation start day. When there is no loaner asset in a stockroom, all the loaner orders become part of a Waitlist. The Waitlisted Orders module under Loaner shows all the wait listed loaners orders. If new loaner assets are added to a stock room or confirmed loaner order are canceled,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

the wait listed loaner orders are confirmed in a sequence of when they were submitted. A loaner order that was submitted before gets precedence over the order that was submitted later.

As an inventory admin, if you want to confirm a wait listed loaner order, uncheck the **Waitlisted** box in the Loaner Asset Order form and in the **Asset** field, select the asset. If you want to move a confirmed loaner order to wait list, check out the **Waitlisted** box and remove the Asset from the **Asset** field. You can assign a loaner asset from any locations and with any of the following states and substates:

- In stock
- Available
- Pending install
- Reserved
- In use

Note: You can't select an excluded loaner asset. For more information, see Hardware Asset Management license exclusion.

Advanced Shipment Notification (ASN)

Advanced Shipment Notification (ASN) automates the creation of asset records in the In transit state when vendors supply both asset and shipment details before delivery.

When a purchase order is created for specific models, vendors can provide detailed asset and shipment information ahead of delivery. ASN uses this information to generate asset records in the In Transit state automatically, reducing manual entry, and enhancing tracking accuracy.

You can initiate the ASN workflow with any of the following roles:

- ham_admin
- ham_user
- procurement_admin
- asset
- admin

ASN Workflow

1. Download the standardized ASN template (.xlsx) and share it with the vendor for completion.
2. The vendor completes and returns the template with asset and shipment information.
3. Import the updated ASN template into the system, where:
   a. A record with a **Pending** status is created in the Shipment Notification Upload [sn_itam_common_asn_upload] table, which initiates the ASN flow.
   b. Data from the ASN template is populated into an intermediate staging table for field validation.
4. After the validation, the following changes happen:

   For rows validated successfully:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Asset records are created in the **In Transit** state.
- Assets are associated with purchase order line items.
- Purchase order statuses are updated to **Pending Delivery**.

For rows that failed validation:

- Records are either ignored or skipped.
- Asset records aren't created.

ASN import validations

The system validates the data in the ASN import template to verify its accuracy before generating asset records.

Purchase Order (PO) validations

1. Verifies that any PO provided in the template exists and is valid in the system.
2. Requires that valid POs should be in either an **Ordered** or **Pending Delivery** state. Otherwise, the system skips the record.
3. The system creates an asset record and adds the **Shipment details** in the template to the **Comments** field, if a PO isn't found.

Location validations

1. Confirms that the location field in the template isn’t empty.
2. if no PO is mentioned in the template, validates the provided location.

Model validations

1. Checks that the model is provided and exists in the system.
2. Ignores software models automatically, as software licenses aren’t supported through the ASN import.
3. Evaluates the asset tracking strategy for the model:
   - If the strategy is set to **Don't create asset**, asset record isn't created.
   - If the strategy is set to **Track as Consumable**, unique identifier check isn't performed.
4. Tracks serialized assets belonging to a model category linked to a CI class with defined identification rules:
   a. Retrieves unique identifier fields.
   b. Validates that all required unique fields are present.
   c. Verifies that at least one unique field value in the import data is different from the values in existing asset records.

Quantity validations for non-consumable assets

1. Checks that the quantity doesn't exceed 1.
2. If the provided quantity exceeds 1, logs an error message in the staging table, resets the quantity to **1**, and creates an asset record.

For more details on ASN import process, see Use Advanced Shipment Notification.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Integration with Lenovo for asset warranty details

The Lenovo Asset Warranty Flow enables you to get the warranty information of hardware assets by connecting to the Lenovo Warranty API.

Integration with Lenovo has the following requirements:

- The Hardware Asset Management application (sn_hamp) must be activated.
- The Lenovo Spoke (sn_lenovo_spoke) installed on your ServiceNow instance from the ServiceNow Store. For detailed information, see Lenovo Spoke.
- The Client ID from Lenovo to connect to the Lenovo Warranty API.

  Note: If you don't have a Client ID, contact your organization's Lenovo sales or service representative.

- A Lenovo connection. If you don't have this connection, it must be created using the Lenovo [sn_lenovo_spoke.Lenovo] connection and credential alias. For more information, see Connect to the Lenovo Warranty API.

Note: For details on the input and response fields of the Lenovo Warranty API, see the "Warranty" topic in the Lenovo WebAPI documentation.

The process involved in fetching the asset warranty details from Lenovo is as follows:

1. The Download Asset Warranty Information - Lenovo scheduled job that runs every week invokes the Lenovo Asset Warranty Flow that fetches all the hardware assets with the manufacturer as Lenovo.

   Note: The Download Asset Warranty Information - Lenovo scheduled job and the Lenovo Asset Warranty Flow are installed with the Hardware Asset Management (sn_hamp) application.

2. The Lenovo Asset Warranty Flow then invokes the Download Asset Warranty action that resides in the Lenovo Spoke application and passes 1000 serial numbers in a batch.
3. The Download Asset Warranty action connects your ServiceNow instance to the Lenovo Warranty API by passing the serial numbers and the Client ID. This action also downloads the warranty information for all the serial numbers that are passed.
4. The Process Warranty Information action in the Lenovo Asset Warranty Flow creates or updates asset warranty records in the Asset Warranty [sn_itam_common_asset_warranty] table using the response from the Lenovo Warranty API.

   The Asset Warranty [sn_itam_common_asset_warranty] table stores the asset warranty details. This table has fields corresponding to the Lenovo API response. Some of the fields of the table are:

   - **External warranty ID**: Identifies the warranty records of an asset and update the warranty information.
   - **Active**: Boolean field based on the **Warranty** field value of the Lenovo API response.
   - **Status**: Indicates whether the warranty is active. This field is populated based on the **Active** field value.
   - **Start Date** and **End Date**: Indicate the warranty period.

Note: Warranty records for excluded assets aren't fetched.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

An asset can have multiple warranties associated with it. You can view the warranty information using the Asset Warranties tab on the asset form. You can also view all the asset warranty records from a central location using the Asset warranties list in the Asset operations view. For more information, see Track the warranty details of your Lenovo assets.

Related topics

Receive asset warranty details from Lenovo

Zero Touch Refresh

Use the Zero Touch Refresh flow to fulfill employee hardware refresh requests through an external vendor without having to maintain new assets in the local stockroom.

The various stages in the asset refresh process are as follows:

1. An employee of your organization submits a request for refresh of the hardware asset.

   The Request confirmation task is created when the Zero Touch Refresh request is approved. The state of this task changes to Closed automatically when the provider confirms the request.

2. Provider ships the new asset to the employee.

   Note: A provider can fulfill a Zero Touch Refresh request by using the Asset Management application.

   The following tasks are created:

   a. Request shipment: This task is created when the provider confirms the Zero Touch Refresh request. The state of this task changes to Closed automatically when the provider ships the new asset.

      The following happen when the provider ships the asset:

      - An asset with the serial number and asset tag specified by the provider is assigned to the employee.
      - Based on the refresh method that the employee selected in the Zero Touch Refresh request, email notifications with details of the new replacement asset that is shipped are sent as follows:
        - When the asset is shipped to the employee, an email notification is sent to all users with the asset role.
        - When the asset is shipped to the stockroom, an email notification is sent to all users with the asset role and also the stockroom manager of the selected stockroom from where the employee will pick up the new asset.
      - Based on the tracking number and shipping carrier details that the provider specified in the request, unique shipment records are created for the shipments of the replacement asset and the old asset. When the same tracking number is provided for both the shipments, a single shipment record is created. You can view the shipment records with the associated assets in the Assets operations view of the Hardware Asset Workspace. For more details, see View hardware asset shipment details.

   b. Ready for pickup: This task is created only for the Pickup refresh method in which the provider ships the new asset to the stockroom from where the employee picks up the asset.

   c. Receive asset: This task is created as follows:

      - For the Ship refresh method, when the provider ships the asset to the employee.
      - For the Pickup refresh method, when the Ready for pickup task is closed.

   d. Receive return asset: This task is created when the provider ships the new asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Employee confirms receipt of the new asset.
4. Employee returns the old asset to the stockroom in the labeled box shipped by the provider.
5. Inventory manager confirms that the old asset was received and evaluates it.

Note: The Zero Touch Refresh flow requires support from an external provider and is pre-configured to integrate with Insight.

The Zero Touch Refresh flow requires the Service Exchange application to be configured on the ServiceNow instance of both the provider and the employee's organization.

For more details, see Configure Zero Touch Refresh flow and Manage refresh of assets using Zero Touch Refresh.

Managing shipments by integrating with third-party carrier applications

You can check the status of your shipments in real time by integrating your ServiceNow instance with a third-party carrier application using the integration framework provided by the IT Asset Management application.

Requirements for integration with third-party carrier applications

Important: The IT Asset Management application provides only the integration framework to integrate with your third-party carrier applications. For the integration to work seamlessly, the implementation team must take care of the following requirements.

1. Create a script include that extends from the base class `ITAMShipmentIntegration` script.

   For more details, see Creating an integration script include for third-party carrier applications.

2. If you're using any credentials, then use the Credential table or any table with Password2 fields and provide the KMF access map policy to enable your customers to access your application.

   For more details, see Password2 encryption with the Key Management Framework (KMF).

3. Add the application name, API, and connection details to the Carrier integration profile [sn_itam_carrier_int_profile] table.

   For more details, see View the carrier integration profile details.

Note: If you're creating the integration as part of an application, complete the following steps before you create a script include:

1. Create an application.
2. Make the application accessible from any application that belongs to a different scope. For more details, see Creating an integration script include for third-party carrier applications.

For more details, see Integration framework configuration for shipment tracking and Track shipments using the integration framework.

Asset Total Cost of Ownership for Hardware Asset Management

Assets incur costs throughout their life cycle, including initial capital costs and operational costs. Asset Total Cost of Ownership helps Asset managers to understand, analyze, and track the Total Cost of Ownership (TCO) of assets, where the total cost includes initial capital cost and operation cost.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You must install Hardware Asset Management 10.0.0 version or later to access the Asset Total Cost of Ownership feature.

TCO benefits

- Track and analyze incurred expenses across the asset hierarchy.
- Benchmark asset costs against assets and asset model to compare performance.
- Create TCO reports and use predefined reports for better financial planning of your assets.

TCO calculation

Costs incurred on the assets are created as expense lines. The expense line shows the history of cost incurred for an asset, which includes the total amount on the expense lines, or the initial capital cost and total expense on all the child assets.

TCO is the sum of all the expenses that occurred on the asset during its lifetime.

- When an asset record is created, the initial cost includes the purchase cost from an expense line that gets created. If you update the cost, the expense line record gets updated.
- For serialized assets, the capital cost is added one time only and the rest is considered as the operational cost. Any expense line created is added to the total cost.
- For a child asset,
  - If any cost is incurred on a child asset, the same cost is added to the TCO of the parent asset.
  - If a child asset is removed, the expense lines of the child asset persist and the TCO of the parent isn't affected.
  - If a child asset is swapped, one expense line is created for operational cost.
- Any expense line created by rate cards is added to the TCO of assets.
- Incidents affecting hardware assets already include task rate cards.

Rate cards, expense lines, and expense categories

Rate cards help you track capital, labor, material, and contract costs and the generated expense lines track these costs. For each task, Hardware Asset Management captures the time worked on that task. After a task is closed, Hardware Asset Management creates expense lines based on the time worked on the task. These expense lines amounts are added to the total cost of the asset. An expense category is then attributed to the expense line. The expense lines appear in the **Expense Lines** tab on the Hardware Asset Details form.

The Hardware Asset Management application supports the following rate cards:

- Task rate cards
- Labor rate cards

Note: The labor rate card is a part of the created expense line and is valid if you've included the labor rate card information with the task rate card, which is recording the time worked on the task.

Capture time for tasks

Each task has a time capturing capability that creates time worked records for that user.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can start, start a timer, pause, resume, and save your tasks. A new record entry is created in the Time Worked tab in the following scenarios:

- Select **Start** to begin your work and then select **Save**.
- Select **Start Timer** to begin recording the time for a task.
- Select **Pause** to pause the recording.
- Select **Resume** to resume the recording.

The timer stops only when you close a task. To arrive at the total time spent on a task, all the record entries are added up and then multiplied with the labor rate to arrive at the total cost for a task.

You can select **Record Time** to add time to the tasks manually.

Work with TCO

TCO enables you to perform the following actions:

- Create expense lines to track the initial and operational cost of your hardware assets.
- Track and calculate TCO for the following workflow tasks and the time worked on an individual task in a workflow:
  - Disposal
  - Donation
  - Zero Touch Refresh
  - Contract renewal

    Note: For Contract cost, allocate and distribute amount asset options are used on the contract rate card to distribute the contract cost evenly. You must add assets to the Asset covered for the contract rate card.

  - Return Merchandise Authorization (RMA)
  - Lease
  - Loaner
  - Hardware asset refresh
  - Asset reclamation

  Note:

  Rate cards are included for the Hardware Asset Management workflows. To activate these rate cards, select the **Active** check box on the Task Rate Card form.

- Track the TCO benchmark of a hardware model. After you specify a TCO benchmark cost, the TCO benchmark threshold is calculated by using the following formula:

  ```
  TCO benchmark cost * TCO benchmark threshold percentage
  ```

  , where the TCO benchmark threshold percentage is set to 75% of the TCO benchmark cost by default. For more information, see Hardware model details.
- Create a report and compare TCO for a group of assets. For more information on the TCO dashboard and reports, see Asset analytics view.
- For real-time or offline TCO reports, normalize the asset TCO over its useful life and compare the normalized TCO for different models and assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- When the useful life of the asset is equal to or greater than asset life, the Normalized TCO (TCO per month) is calculated by using the following formula:

```
(Purchase cost / Useful life) + (Sum of operational cost /
 Asset life)
```

- When the useful life of the asset is lower than asset life, Normalized TCO (TCO per month) is calculated by using the following formula:

```
(Purchase cost + Sum of operational cost) / Asset life
```

Note: TCO isn't calculated and tracked for the following assets and consumables:

- Bundle assets
- Pallet assets
- Individual consumables

  If you have used consumables as child assets, their expense lines are added to the parent asset.

- Excluded assets
- Assets that are a part of the opted out model categories.

Manage onboarding of hardware products using Application Portfolio Management

Onboard your hardware products and manage the Technology Reference Model (TRM) life-cycle by using Technology Reference Model (TRM) of Application Portfolio Management along with the Hardware Asset Management application.

The Technology Reference Model enables you to maintain a list of hardware products with information on their approval of use within the organization. The TRM library is maintained by enterprise architects and used by application owners. For detailed information on TRM, see . TRM enables application owners to request hardware products to be used in the organization, onboard the product, and define the TRM life-cycle phases.

Each hardware product model is associated with a set of life-cycle phases with a start and end date. The Hardware Asset Management application gives visibility into the TRM life-cycle phases for all hardware models associated with a product.

Synchronizing TRM information with Hardware Asset Management

The HAM - Sync TRM information scheduled job in Hardware Asset Management runs daily to fetch information such as TRM phase and life-cycle for normalized product models from TRM. The job then sends the TRM details to the Hardware Asset Management application. When the scheduled job runs daily, any updates made to the TRM phase are synchronized with Hardware Asset Management.

You can view the following TRM-related information for a hardware product model in the Model Management view of Hardware Asset Workspace:

- The TRM phase using the **TRM product phase** field on the **Details** tab of the hardware product model.
- TRM life-cycle information using the **TRM Product Lifecycles** related tab of the hardware product model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Repair flow to fix defective hardware assets within a stockroom

Use the Repair flow to get the defective hardware assets in your stockroom fixed so that the repaired assets can be used in different Hardware Asset Management workflows.

By using the Repair flow, your organization can internally fix the assets that are damaged or out of the warranty period. The repaired assets can be put back to use after validation. There's no external vendor involved in the repair of defective assets.

As an asset manager, you can request repair of assets that are either defective or pending repair in your stockroom by submitting repair orders. For more details, see Request repair of defective hardware assets in your stockroom. The repair flow is triggered when you submit a repair order. A repair order has repair order lines that are associated with repair tasks for the assets. The asset technician completes the repair tasks in the Hardware Asset Workspace or by using the Mobile Agent application. The repair flow completes after the repaired asset is evaluated. For details, see Manage repair of defective assets in your stockroom in the Hardware Asset Workspace and Manage hardware asset repair tasks using the Mobile Agent application.

Stages in the Repair flow

1. Troubleshoot: Stage to evaluate the defective asset and assess the following:
   - Issues with the asset
   - Parts required
   - Steps to repair the defective asset

   At this stage, an asset technician confirms if the asset is repairable, redeployable, or unrepairable. The Repair flow proceeds to the next stage only if the asset is repairable. Otherwise the repair order is marked as Complete.
2. Repair: Stage to confirm repair of the defective asset. In this task, the asset is either repaired, redeployed, or marked as unrepairable.

   The repair flow proceeds to the next stage only if the asset is repaired. Otherwise the repair order is marked as Complete.
3. Evaluate: Stage to perform a quality control check of the repaired asset. Based on the evaluation results, the asset is either redeployed or disposed of. The Repair flow is completed after asset evaluation.

Inventory picking for Hardware Asset Management

As an inventory user working in large stockrooms, use the Inventory picking feature to pick the assets in the stockroom easily and facilitate the asset pick-up by technicians.

The Inventory picking feature includes adding an Asset pick task in the following Hardware Asset Management workflows:

- Standard Hardware Asset Request
- Hardware Refresh Request
- Sourcing workflow

Note: The Asset pick task is available only if it's enabled explicitly for a stockroom that's used to source asset requests, refresh requests, or sourcing requests. For details, see Enable the Asset pick task for your stockroom in the Hardware Asset Workspace.

The Asset pick task enables you to pick the assets from any aisle and space within your stockroom. You can then drop the asset that you picked to a specified place within the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

stockroom. After you complete the Asset pick task, asset technicians can pick up the assets to fulfill the requests assigned to them.

For more information on the Asset pick task, see Manage picking hardware assets within your stockroom for Hardware Asset Management workflows and Manage hardware asset pick tasks using the Mobile Agent application.

Managing inventory by putting away assets in the stockroom drop-off location

Use the Asset put away feature to track asset movement efficiently in the inventory.

The Asset put away task enables you to track asset movement from the receiving bay of the inventory to the designated space within the stockroom. The Asset put away task confirms that when an asset is received in the inventory, you have filled the aisle-space information for it. An Asset put away task is automatically created in the Hardware Asset Workspace when the following required business rules are met:

- When a hardware asset is created in the Hardware Asset Workspace and the **Aisle-space** field value isn't available, an Asset put away task is created. Open the Asset put away task and update the **Drop off location** field value, to move the asset to designated aisle-space in the stockroom.

  Note: You can create an Asset put away task manually for the in stock assets in the inventory. For more information about manually creating an Asset put away task in the Hardware Asset Workspace, see Create an Asset put away task.

- When the **Stockroom** field is updated for a hardware asset in the Hardware Asset Details form, an Asset put away task is created. Open the Asset put away task and update the **Drop off location** field value, to move the asset to the designated aisle-space in the stockroom.

Note: You can create the Asset put away task for a stockroom only if the stockroom is enabled to perform warehouse tasks. For more information about enabling the feature, see Enable the asset put away task for your stockroom.

In the Hardware Asset Workspace, the inventory users can perform the following actions:

- Create an Asset put away task manually for the in stock assets. For more information, see Create an Asset put away task.
- View the open put away tasks related to the inventory and stockroom. For more information, see View open put away tasks for your stockroom.
- Update the **Drop off location** field for the open task in the Put away form and close it. For more information, see Close an Asset put away task.

Using the ServiceNow Agent application, you can scan the in stock assets in the inventory and put them away in the scanned drop-off location. After the asset is placed in the drop-off location within the stockroom, you can close the Asset put away task. For more information about the mobile experience for Asset put away task, see Manage asset put away using the ServiceNow Agent application.

Zero Touch request flow

Fulfill the hardware requests of your employees through an external provider with minimal intervention by using the Zero Touch request flow.

Zero Touch request flow requirements

The Zero Touch request flow has the following basic requirements:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Your organization and the provider must be on the ServiceNow Cloud.
2. The ServiceNow Service Exchange application must be configured on the ServiceNow instance.
3. Your provider must have published the Remote catalog items or Remote record producers.

Zero Touch request workflow

1. An employee of your organization submits a catalog request for a catalog item associated with the Zero Touch request flow.

   A catalog request is created with the **Request state** as **Pending Approval**.

2. The approver reviews the catalog request and performs either of the following tasks:
   - Rejects the catalog request: The **Request state** changes to **Closed Rejected** and the **Stage** of the requested item changes to **Closed incomplete**.
   - Approves the catalog request: The **Request state** changes to **Approved** and the **Stage** of the Requested item changes to **Pending Confirmation**.

     Note: If a requester who doesn't have access to the remote record producer submits a catalog request, the requested item is marked as **Closed incomplete**.

3. After the catalog request is approved, the request goes through the following changes:
   a. The request is sent to the provider based on the Remote record producer configured in the catalog item mapping.
   b. The **Stage** of the requested item changes to **Pending confirmation** on the ServiceNow instance of your organization.
4. The provider sends a Scratchpad update confirming the order to your ServiceNow instance. The **Stage** of the requested item changes to **Pending shipment**.
5. The provider ships the asset to your employee and sends a Scratchpad update with the shipment details to your ServiceNow instance.

   The following events happen when the provider ships the asset:
   - An asset with the serial number and asset tag specified by the provider is assigned to the employee.

     Note: An email notification is sent to the asset managers in the following scenarios to take necessary actions:
     - An asset record with the serial number provided by the provider exists on your ServiceNow instance.
     - The model number provided by the provider isn't available on your ServiceNow instance.
     - The asset that is shipped is a consumable.

   - Based on the tracking number and shipping carrier details that the provider specified in the Scratchpad update, a unique shipment record is created for the shipment. You can view the shipment records with the associated assets in the Assets operations view of the Hardware Asset Workspace. For more details, see View hardware asset shipment details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

When shipping an asset bundle, the provider can choose to ship the assets fully through a single shipment or partially through multiple shipments. Only when the assets are fully shipped, the **Stage** of the requested item changes to **Pending receive**.

6. The employee acknowledges the receipt of the asset on a mobile device. The Stage of the requested item changes to Complete.

   Note: Receipt of the consumable asset can't be confirmed on a mobile device. The asset manager takes the necessary actions based on the email notifications received and confirms on behalf of the employee.

For more details on creating and fulfilling hardware asset requests through the Zero Touch request flow, see Use Zero Touch request flow.

Asset Attestation

Use Asset Attestation to maintain accurate details of all the serialized hardware assets that are assigned to your employees.

Asset Attestation has no dependency on the availability of the assets at the office locations. Therefore, organizations that support hybrid and remote work models can audit their assets that are in use even if those assets are dispersed across remote locations. You can achieve asset data accuracy, improve asset utilization, and reduce risk by auditing your assets using Asset Attestation.

As an Asset manager or an Inventory administrator, you can create a one-time asset attestation or create an attestation schedule that creates recurring asset attestations. You can validate whether the serialized hardware asset that's assigned to an employee is still in use by receiving confirmation from the employee directly.

Asset Attestation benefits

- Step-by-step guidance on creating asset attestations and schedules using the playbook. For more details, see Playbook for asset attestation.

  Important: Starting with Hardware Asset Management version 13.0.0, the playbook is the default option for the creation of asset attestations and schedules. However, if you set the value of the *sn_itam_common.enable_asset_attestation_playbook* system property to **false** with the asset or inventory_admin role, you will be shown forms to complete the attestation process instead of the playbook.

- Ability to perform remote asset audits for the required hardware assets irrespective of their locations. For more details, see Create an asset attestation in the Inventory view.
- Option to set a schedule for creating recurring asset attestations. For more details, see Create an asset attestation schedule.
- Intuitive and user-friendly Now Mobile app and Employee Center portal that enable the employees to confirm the ownership of the assigned hardware assets and also raise issues related to their hardware and consumable assets. For more details, see the following:
  - Confirm the assigned assets using the Now Mobile app
  - Confirm the assigned assets on the Employee Center portal
  - Raise issue related to your asset on the Employee Center portal
- Comprehensive reports that enable Asset managers and Inventory administrators to monitor the status of asset attestations and remediation tasks, and take necessary actions. For more details, see the following:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- View open asset attestations in the Hardware Asset Workspace
- View open remediation tasks for asset attestations in the Hardware Asset Workspace
- View attestations for a serialized hardware asset

Requirements and limitations

Asset Attestation has a dependency on the following ServiceNow Store applications:

- Employee Center (sn_ex_sp)
- Employee Profile (sn_employee)

For more details, see Employee Center and Employee profile.

If you plan to audit your assets by using Asset Attestation, then consider the following points:

- Serialized hardware assets that belong to the opted-in resource categories can only be attested. Excluded hardware assets can't be attested.
- Consumables, bundles, and pallets can't be attested.
- Attestation supports assets that belong to resource categories of HAM solutions only if they're opted-in.
  - Hardware Asset Management integration with Telecommunications Network Inventory- Only assets of Server, Network gear, and Telecom Network Inventory (TNI) resource categories can be attested.
  - Hardware Asset Management integration with Zero Touch Mobility- Only assets of Mobile Device resource category can be attested.

  HAM licensing groups hardware into resource categories, such as servers, end user computers, mobile devices, and network gear. Asset attestation includes only the assets that belong to the opted-in resource categories. If an asset doesn't appear in an attestation cycle, check whether its resource category is opted in. For information about resource categories and how to opt in or out, see Hardware Asset Management licensing and Opt-in or opt-out of HAM license resource categories.

Asset Attestation workflow

1. An Asset manager or an Inventory administrator creates a one-time asset attestation by selecting the employees assigned with the assets and the model categories of the assets.

   An attestation record is created in the Asset Attestation [sn_itam_common_asset_attestation] table. Also, the details of the asset to be attested are added to the Attestations for Asset [sn_itam_common_attestation_asset_m2m] table.

2. An email notification is sent to the employees who are responsible for confirming the ownership of the assigned assets.
3. The employees verify the asset details and either accept or deny the ownership of the asset through the Now Mobile app or on the Employee Center portal.

   The status of the asset attestation record is updated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Attestation schedule workflow

1. An Asset manager or an Inventory administrator creates an attestation schedule to create recurring attestations.

   An attestation schedule record is created in the Asset Attestation Schedule [sn_itam_common_attestation_schedule] table.

2. The *ITAM Common- Asset attestation* daily job runs daily to check through all the asset attestation schedules. This daily job then creates asset attestations based on the frequency specified in the attestation schedule.

For more details on Asset Attestation, see Audit your hardware assets by using Asset Attestation.

Related topics

Audit your hardware assets by using Asset Attestation

Playbook for asset attestation

Receiving hardware and consumable assets at stockrooms

As an inventory user, you can receive assets at a stockroom from any workflow using the unified and standardized receiving mechanism.

With the standardized receiving process, you don't need to be familiar with the specific workflow to which the assets belong. Therefore, you can receive hardware and consumable assets from different shipments originating from sources, like transfer orders, purchase orders, or any other workflows seamlessly.

Benefits of standardized receiving mechanism

- An intuitive user interface standardizes the receiving process, eliminating unique receiving methods for different workflows.
- A standard and common entry point for the receiving process reduces the time spent to receive assets and enhances the efficiency of inventory users.
- The ability to receive assets in bulk using Excel templates.
- Improved asset data quality by requiring assets to have unique identifiers when they’re received at the stockroom.
- Comprehensive validations makes sure that there are no discrepancies in the asset data.

Requirements and limitations

- You can receive enterprise assets in the Hardware Asset Workspace only if the Enterprise Asset Management applications is activated.
- You can receive hardware assets in the Enterprise Asset Workspace only if the Hardware Asset Management application is activated.
- You can only receive complete quantity of consumables.
- You can receive assets from a purchase order line starting from the Zurich release, as well as Yokohama Patch 11 and Xanadu Patch 10 or later.

Asset receiving mechanisms

You can receive a single asset or multiple assets in bulk using any of the following options on the enhanced stockroom form:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Receive assets**: You can either search for an asset using its Asset Tag, Serial Number, or MAC address and receive it, or select one or more assets from the list of inbound shipment assets and receive them. For more details, see Receive a hardware asset at a stockroom in the Hardware Asset Workspace and Receive assets from inbound shipments at your stockroom in the Hardware Asset Workspace.
- **Import assets**: You can download the Excel template, add the asset details that you want to receive, and import the Excel template. During the import process, the system performs validations, and you can view the imported asset records, validation status, and comments in the Import asset row [sn_itam_cmn_import_asset_row] table. Based on the validation status, you can select and receive the assets. If there are any issues with the asset records, you must address those issues before you can receive the assets. For more details, see Import and receive assets in bulk at your stockroom in the Hardware Asset Workspace.

When any asset is received at the stockroom, the following changes happen:

- The State of the asset changes from **In transit** to **In stock**.
- The stockroom field on the asset form is automatically updated.
- The receive tasks in the source workflows associated with the asset that you received are automatically closed.

Asset performance reports in the Hardware Asset Workspace

Gain insights into the overall operational efficiency of your organization's hardware assets by using the asset performance reports available in the Asset analytics view.

Asset performance involves assessing how effectively and efficiently assets fulfill their intended functions within an organization. The evaluation includes measuring and analyzing key performance indicators (KPIs), such as:

- Asset availability to determine when the asset is operational
- Mean time between failures (MTBF) to measure reliability
- Mean time to repair (MTTR) to measure repair efficiency
- Total asset task time summary to measure the total time worked on the related tasks for an asset and its child assets.

Benefits of tracking asset performance

Reduce unplanned downtime

Real-time asset health monitoring can prevent and predict issues before they cause downtime.

Improve maintenance efficiency

Metrics like MTTR and MTBF help you schedule maintenance more effectively, reducing wasted time, and improving technician efficiency.

Maximize asset life and return on investment (ROI)

By detecting early signs of wear and tear and scheduling timely repairs, organizations can make their equipment last longer and delay the need for replacements.

Enhance financial planning

Performance insights help identify models or locations with poor performance or ongoing problems, guiding better investment choices.

Align operations with service levels

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tracking availability ensures that assets achieve the required uptime targets set by service level agreements (SLAs), compliance standards, or production schedules.

Considerations, requirements, and limitations

- To track additional hardware model categories in KPIs, opt in the relevant HAM resource categories. Otherwise, newly added model categories do not appear in performance metrics or dashboards.
- The **First Used** field on HAM assets must contain a valid timestamp for accurate asset performance tracking. Assets with missing or invalid First Used values are excluded from performance calculations, creating gaps in lifecycle and utilization reporting.
- Asset key performance indicators (KPIs) aren't calculated for pallets, consumable, and bundle assets.
- Asset KPIs aren't calculated by default.
- To track asset KPIs including Asset availability, MTBF, and MTTR, complete these configurations:

  1. Opt in to the model categories of the assets for which you want to monitor the KPIs.

     Note: If a model category has child categories, selecting the parent category for performance tracking doesn’t automatically include the child categories. You need to opt in to the specific child categories you want to track.

  2. Define an operation schedule, which is a collection of schedule entries that specify the operational status and total operational duration for any entity that references the schedule. The schedule entries define calendar hours of operation within a schedule.

     For details, see Create an operational schedule for hardware assets.

     Note: If an operational schedule isn't defined, the Default operation schedule is applied.

  3. Create an Asset schedule to associate the hardware assets with an operational schedule.

     Note: If an asset isn't associated with an operational schedule, the Default asset schedule will be applied.

- The calculation of asset KPIs for hardware assets begins when the asset transitions to the In use state for the first time.
- KPIs are tracked until the state of the asset changes to Retired or Missing.

Calculation of asset KPIs

The KPIs are calculated based on the tasks associated with the asset and the operational schedule of the asset. The KPI values are stored in the Asset availability [sn_ent_asset_availability] table, which extends the Service Availability table.

Performance tracking for assets that belong to a model category opted in for performance tracking begins when the asset’s state changes to In use for the first time. A record is then created in the Asset Availability table with **Asset availability %** set to **100**. The Asset availability % value decreases when the asset experiences an outage.

Outage record creation

An outage record is created in the Outages [cmdb_ci_outage] table in the following unplanned outage scenarios:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The state of an asset changes from In use to any of the following:
  - In stock - Pending repair
  - In stock - Pending disposal
  - In stock - Defective
- An incident is created

The outage record is closed when:

- The status of the asset changes back to In use.
- The incident is closed.

The duration of the outage is calculated when the repair task is closed.

Handling overlapping outages

Outages can overlap due to multiple events being logged within the same time window. To maintain accurate KPI calculations, overlaps between unplanned outages are handled with these rules:

- When multiple unplanned outages, such as an asset moving from In use to In stock - pending repair state and an incident being created on the same asset, occur during overlapping time periods, they are not treated as separate outages. Instead, they are merged into a single outage to avoid overstating downtime.
- The total duration of this combined outage is calculated by merging all overlapping time intervals.
- A sample outage calculation is here:

1. Outage A: 10:00 AM – 12:00 PM
2. Outage B: 11:30 AM – 1:00 PM

   Result: The resulting outage window is 10:00 AM – 1:00 PM (a single 3-hour outage).

Passing on outages through the asset hierarchy

In an asset hierarchy, outage on assets or their child assets are handled as follows:

- If a child asset with the **Required** field set to **true** experiences an outage, its parent asset will also have the outage.
- If a parent asset has an outage, all its child assets will also have the outage.

Asset KPIs

Asset KPI	Formula
Asset availability (in %)	`(Operating hours - Total planned downtime - Total unplanned downtime)/(Operating hours - Total planned downtime)`
Mean time between failures (MTBF) (in hours)	`(Operating hours - Total planned downtime - Total unplanned downtime)/(Total unplanned outages)`

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset KPIs (continued)

Asset KPI	Formula
Mean time to repair (MTTR) (in hours)	`(Total unplanned downtime)/(Total unplanned outages)`

Definition of the variables used in the KPI calculations is as follows:

Variable	Definition
Operating hours	The duration from when the asset first transitioned to the In use state until the current date and time within the asset schedule.
Planned downtime	The duration from when the asset transitioned from the Work in progress state to the Closed complete state.
Unplanned downtime	The duration from when the asset transitions from the In use state to any repair state, such as In stock - Pending repair, In stock - Pending disposal, or In stock - Defective, until it returns to the In use state, within the asset schedule. If there are overlapping durations between the repair state and an incident on the same asset, the combined duration of both is considered. The asset schedule is also considered when determining the outage duration.
Total unplanned outages	The count of total outage records for an asset. Overlapping and concurrent outages are consolidated as one outage.

Accessing asset KPI reports

- Contextual sidebar of the asset Form: You can view the following reports by using the options available in the contextual sidebar of the asset form.
  - Asset availability and related KPIs report for an individual asset.
  - Asset task time summary report for all hardware assets.
- Asset performance tab on the Asset analytics view: You can view the average values of the KPIs, including Average availability, Average MTTR, and Average MTBF, for all the assets that are being tracked. Additionally, you can see a list of the assets that contributed to the calculation of these KPIs. For details, see Asset analytics view in the Hardware Asset Workspace.

Scheduled job for calculation of asset KPIs

- The *`Calculate asset performance KPIs`* scheduled weekly job runs every Saturday to calculate the KPIs for the assets that belong to the model categories opted in for performance tracking. These KPIs are then reflected in the Asset availability and related KPIs report, which displays the most recent KPI values.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: To track historical KPIs for existing assets in the opted-in model categories, run the *Calculate availability for historical data* job. This job considers the following tasks associated with an asset to calculate the outages and KPIs:

- RMA task
- Repair task
- Troubleshoot task
- Evaluate task
- Recall task

- The *Asset availability data collection* scheduled weekly job runs every Sunday to calculate the average values of the KPIs that includes Average availability, Average MTTR, and Average MTBF. The job then generates the reports in the Asset performance tab of the Asset analytics view.

Approximated lifecycle and lifecycle code

Leverage the expanded lifecycle coverage for hardware and consumable models available in the ServiceNow® Content library portal when explicit dates from the manufacturer aren't available. Hardware models with approximated lifecycle dates contain a lifecycle code that indicates the dates are approximate.

When manufacturers don't publish official life cycle dates for certain hardware models and consumables, the#ServiceNow® Content Service generates approximated life cycle dates. The approximated lifecycle dates are derived using data-driven approximation logic to determine the most likely life cycle phase dates for the hardware and consumable models.

The estimated life cycle dates are categorized using specific lifecycle codes. These codes indicate that the lifecycle dates aren't the explicit dates published by the manufacturer. When lifecycle dates are unavailable for any models, codes such as Exception Codes (EXC) and End-of-Phase Codes (END) are assigned to those models. These codes provide clarification regarding the absence of these dates.

The Hardware Lifecycle code [sn_ itam_common_lifecycle_code] table stores the approximation codes and its description for the lifecycle records that are curated through approximation logic. For a detailed explanation of lifecycle codes, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB2726382.

The Lifecycle code column in the Hardware Lifecycle Definition [sn_hamp_lifecycle_definition] table indicates the approximate code for a model's lifecycle. This column references the Lifecycle code column in the Hardware Lifecycle Code [sn_hamp_lifecycle_code] table.

Load approximated lifecycle date for hardware and consumable models

The scheduled job *HAM – Hardware Life cycles* retrieves the life cycles date that is published by the ServiceNow Content Service and loads them into the following tables:

- cmdb_hardware_model_lifecycle (for hardware models)
- cmdb_consumable_model_lifecycle (for consumable models)

The system property *approximate_dates_in_hw_lifecycle* determines whether only manufacturer-provided actual dates or both actual and approximated dates are loaded into the hardware and consumable life cycle tables. The default value of the system property *approximate_dates_in_hw_lifecycle* is **True**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If this property is set to **False**, only the actual life cycles from the manufacturer are loaded into the hardware and consumable life cycle tables.
- If it is set to **True**, both actual and approximated life cycles are loaded into the hardware and consumable life cycle tables.

Identifying models with approximated lifecycle dates

In both the Hardware Model Lifecycles [cmdb_hardware_model_lifecycle] and Consumable Model Lifecycles [cmdb_consumable_model_lifecycle] tables, as well as in the Model management view within the Hardware Asset Workspace, the Lifecycle code column indicates if the model's lifecycle phase and dates have been approximated.

- If the Lifecycle code column contains a value, the model's lifecycle phase and dates are based on an approximated lifecycle code.
- If the Lifecycle code column is empty, the model's lifecycle dates are confirmed or explicit dates published by the manufacturer.
- If the Lifecycle code column contains a value, and the model's lifecycle phase and dates are empty, the Lifecycle code column indicates the reason for the absence of these dates.

Note: When manually adding a new lifecycle record, such as a custom lifecycle or calculated lifecycle, you can't add a lifecycle code value. The lifecycle code is only available for lifecycle records that come directly from the ServiceNow Content Service and can't be set for the user created lifecycle records.

Configuring Hardware Asset Management

Configure Hardware Asset Management to have centralized asset data for accurate inventory and insights, automate the IT life cycle with workflows, and reduce the asset costs and risks.

Configuration overview

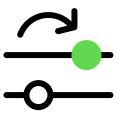
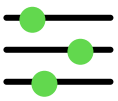
Here's an overview of the process for configuring Hardware Asset Management.

Configure Hardware Asset Management

Step	Action	Resource
 Install Hardware Asset Management	Install the Hardware Asset Management application from the Product Hub or the ServiceNow Store.	Installing Hardware Asset Management
 Configure Hardware Asset Management	Use the Configuration Console to complete a guided, module-by-module setup of Hardware Asset Management after installation.	Configuration Console for Hardware Asset Management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure Hardware Asset Management (continued)

Step	Action	Resource
 Opt-in to the Hardware Asset Management Content Service	Opt in to the Hardware Asset Management Content Service to improve the normalization process.	Opt-in to the Hardware Asset Management Content Service
 Opt-in or opt-out of Hardware Asset Management license resource categories	Opt in the HAM license resource categories that are part of the HAM subscription.	Opt-in or opt-out of HAM license resource categories
 Update the Decision tables for HAM	Update the associated Decision tables to trigger a new or customized HAM flow.	Update associated Decision tables for HAM flows
 Configure stockrooms	Configure stockrooms to define types, stock rules, service locations, distribution channels, and automated sourcing settings for hardware assets.	Configure stockrooms
 Integrations and advanced configuration	Configure integrations and advanced settings for contract repository workflows, hardware model normalization, TCO, KPI tracking, shipment tracking, Zero Touch flows, warranty APIs, and asset donation.	Integrations and advanced configuration
	Install and set up ServiceNow Otto for HAM.	Configuring ServiceNow Otto for Hardware Asset Management (HAM)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure Hardware Asset Management (continued)

Step	Action	Resource
Configure ServiceNow Otto for HAM		
 Use Hardware Asset Management	Use Hardware Asset Management to manage your hardware and consumable assets and reduce the asset costs and risks.	Using Hardware Asset Management

Installing Hardware Asset Management

The Hardware Asset Management (HAM) application can be installed from the Product Hub or the ServiceNow Store.

Installation methods

Method	When to use
Product Hub	You are setting up HAM for the first time and want a guided installation experience. Product Hub installs your entitled HAM application and shows you additional applications and plugins that are available for your subscription tier.
ServiceNow Store	• You are installing HAM without using the guided Product Hub experience. • Your ServiceNow instance does not have ServiceNow Otto for Setup (sn_ia) or Setup Hub (sn_ia_base) installed.

Hardware Asset Management on Product Hub

Product Hub provides a single location to install, update, and manage HAM applications and plugins.

The Product Hub gives administrators a single starting point to install Hardware Asset Management and additional applications, and configure them using the Configuration Console.

Key benefits

Product Hub provides the following benefits for HAM:

- Reduces manual setup effort with a single starting point for HAM installation and configuration.
- Displays all HAM applications and plugins available for your subscription tier, organized by installation status.
- Shows available updates for installed HAM applications so administrators can keep HAM current.
- Displays installation progress so administrators can track the status of HAM applications being installed through the ProductHhub.
- Links to HAM product documentation, release notes, community resources, and a product overview video.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Access and roles

Access to Product Hub requires one of two granular roles, which a system administrator must grant:

Roles to access Product Hub

Role	Access level
ia_admin	Full access: install, update, and manage HAM applications and plugins
ia_user	View-only access: browse Product Hub but can't install applications

Note: System administrators have access to Product hub by default. A system administrator must grant ia_admin or ia_user role to other users based on the access level required.

How it works

Product Hub is accessible from the Admin Home page through the **Hardware Asset Management** card in the **Manage your products** section.

Important: The **Hardware Asset Management** card is available only after you install one of the following applications on your ServiceNow instance:

- AI Native SKUs: ServiceNow Otto for Setup (sn_ia)
- Non-AI Native SKUs: Setup Hub (sn_ia_base)

First-time installation

When the core HAM application isn't installed and the administrator selects the **Hardware Asset Management** card, Product Hub displays the following options:

- **Start new setup**: Installs HAM and the required applications and plugins for the first time.
- **Upload new batch**: Moves an existing HAM setup from another ServiceNow instance by uploading a batch update set.

Managing applications after installation

After the core HAM application is installed, Product Hub displays the following tabs so administrators can manage additional HAM applications and plugins:

- **Not installed** - Applications and plugins available for your subscription tier that are not yet installed. If you move to a higher subscription tier, the mandatory core application for that tier also appears here.
- **Installed** - Applications and plugins currently installed in the ServiceNow instance.
- **Updates available** - Available updates for installed HAM applications.

The applications and plugins displayed in the **Not installed** tab depend on your subscription tier.

Note: When the HAM application is installed, Product Hub displays the **Installed**, **Not installed**, and **Updates available** tabs instead of the **Start new setup** option. The **Configure** card is also available and links to the Configuration Console, where administrators can track configuration progress. For more details, see Configuration Console for Hardware Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Install Hardware Asset Management from Product Hub

Install the Hardware Asset Management application on your ServiceNow instance from Product Hub based on your subscription tier.

Before you begin

- The Hardware Asset Management application must be licensed for your ServiceNow instance.
- To access the Admin Home page, install the application that matches your SKU type: ServiceNow Otto for Setup (sn_ia) for AI Native SKUs, or Setup Hub (sn_ia_base) for non-AI Native SKUs.

Role required: ia_admin

About this task

Use this procedure for initial HAM installation. If HAM is already installed, Product Hub does not display the setup option and instead displays the tab view for managing additional applications and plugins.

Procedure

1. Navigate to **Admin** > **Admin Home**.
   The Admin Home page opens automatically when you log in to your ServiceNow instance.
2. In the **Manage your products** section of the Admin Home page, select the **Hardware Asset Management** card to open the Product Hub.
3. Select **Start new setup** to install HAM.

   Note: If you are moving an existing HAM setup from another ServiceNow instance, select **Upload new batch** instead of **Start new setup**. You may have to configure some instance-specific settings again after the upload. For details, see Manage update set for ServiceNow Otto for Setup.

   The Apps and plugins page opens, displaying the core HAM application for your highest entitled subscription tier in the **Not installed** tab. For example, if you are entitled to Hardware Asset Management Advanced, **Hardware Asset Management - Advanced** appears in the **Not installed** tab.
4. Select the **Not installed** tab and install the core HAM application.
   - For Hardware Asset Management - Advanced and Hardware Asset Management - Prime, select the Open Application Manager icon to navigate to Application Manager and then install the application from there.
   - For Hardware Asset Management - Pro SKU, select the Install icon to install directly in Product Hub.

Result

- The core HAM application is installed and appears in the **Installed** tab.
- The additional applications and plugins included in your subscription tier appear in the **Not installed** tab.
- The **Configure** card that opens the Configuration Console appears.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

- To install additional HAM applications and plugins for your subscription tier, see Install additional HAM applications using Product Hub.
- To configure HAM, see Configure Hardware Asset Management using the Configuration Console.

Note: You can configure the HAM application before installing additional applications.

Install additional HAM applications using Product Hub

Install the HAM applications and plugins included in your subscription tier that are not yet installed in your ServiceNow instance.

Before you begin

The HAM application must be installed in your ServiceNow instance.

Role required: ia_admin

About this task

Use this procedure to install additional HAM applications and plugins after your initial HAM installation. Product Hub displays the applications and plugins included in your subscription tier. If your account was upgraded to a higher subscription tier, the required core application for the new tier appears in the **Not installed** tab. For example, if you upgrade from Hardware Asset Management Pro to Hardware Asset Management Advanced, the Hardware Asset Management Advanced application appears in the **Not installed** tab.

Procedure

1. Navigate to **Admin** > **Admin Home**.
   The Admin Home page opens automatically when you log in to your ServiceNow instance.
2. In the **Manage your products** section of the Admin Home page, select the **Hardware Asset Management** card to open the Product Hub.
3. Select the **Not installed** tab.
   The tab lists additional HAM applications and plugins included in your subscription tier that aren't currently installed.
4. Select the application or plugin that you want to install.
   - If the application has an Install icon, select it to install directly from Product Hub.
   - If the application displays an Open Application Manager icon, select it to navigate to Application Manager and complete the installation from there.

Result

- The application appears in the **Installed** tab.
- The application appears in the **Updates available** tab if updates are available.

What to do next

To configure the installed application, see Configure Hardware Asset Management using the Configuration Console.

Install Hardware Asset Management from the ServiceNow Store

You can install the Hardware Asset Management application (sn_hamp) if you have the admin role. The application includes demo data. Install related ServiceNow® Store applications and plugins if they are not already installed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Review the Hardware Asset Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: ham_admin

About this task

The following items are installed with Hardware Asset Management:

- Roles
- Scheduled jobs
- Tables

For more information, see Installed with Hardware Asset Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Hardware Asset Management application (sn_hamp) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you 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. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configuration Console for Hardware Asset Management

The Configuration Console gives administrators a centralized, module-by-module setup experience to configure Hardware Asset Management features after installation.

Key benefits

- Gives administrators a single location to view and complete all hardware asset management configurations, without navigating across multiple application areas.
- Shows completion status for each module, so administrators can track setup progress at a glance.
- Links to relevant documentation directly within the console during module configuration.
- Offers AI assistance to configure items such as assignment groups, users, and roles.

> **Note:** AI-assisted configuration provides suggestions based on your instance data and may not always be accurate. Review and validate all AI-generated configurations before applying them to verify they meet your organization's requirements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Access Configuration console

After installing the Hardware Asset Management application, a **Configure** option appears on the Product Hub page. Select this option to open the Configuration Console.

Configuration console overview

The **Configure Hardware Asset Management** page is the landing page of the Configuration Console. It has three main areas:

Configuration Summary

The Configuration Summary pane lists all configuration items organized into four modules: **HAM Foundations**, **Team management**, **Otto**, and **Operations**. Each group expands to show individual setup items.

Setup status

Displays a tile for each configuration module with a progress indicator showing the number of items configured out of the total. Select **Get Started** to begin configuring a group, or **Continue** to resume where you left off.

Configuration activity

Displays the configuration changes recorded on this instance. Use the **Configured items** tab to review individual items marked as configured. Use the **Completed batches** tab to review changes grouped into completed batched update sets.

Reuse and AI-assisted configuration

The Configuration Console header provides two options outside the standard item-by-item workflow:

Package and download

Groups completed configuration changes into a batched update set and downloads it. Apply the update set on another instance to replicate the same configuration without repeating the manual work.

Configure with AI

Opens ServiceNow Otto to configure supported items with AI assistance. Available for Assignment groups, Users, and Roles in the Team management configuration module.

Modules in Configuration Console

The modules available in the Configuration Console depend on which applications are installed on your ServiceNow instance. Configuration Console modules require specific roles to view and configure setup items.

Modules in Configuration Console

Module	Setup items	Roles required
HAM Foundations	**HAM Resource Category**	ham_admin
	Content Service setup	ham_admin
	Hardware Content download	admin
	Custom model categories	ham_admin
	CMDB Success Advisor	ham_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Modules in Configuration Console (continued)

Module	Setup items	Roles required
	Scheduled jobs	admin
	Properties **Note:** For details on system properties that can be configured from the Configuration Console, see Hardware Asset Management system properties.	• **Asset lifecyle and operations** ○ ham_admin ○ sn_hamp.ham_system_admin ○ asset_system_admin ○ inventory_admin ○ procurement_system_admin • **Procurement and inventory** ○ ham_admin ○ asset_system_admin ○ contract_system_admin ○ procurement_system_admin ○ sn_hamp.ham_system_admin • **Reporting**: ham_admin • **System configuration**: model_manager • **Others**: ham_admin and sn_hamp.ham_system_admin
Team management	**Assignment groups**	admin
	Users	admin
	Roles	admin
Otto	**Otto skills** **Note:** This module appears only when the ServiceNow Otto for Hardware Asset Management (HAM) application is installed.	admin
Operations	**Asset lifecycle** • **Contract Workflows** • **Asset Automation** • **Asset lifecycle category** • **Asset lifecycle catalog items** • **Asset lifecycle workflows**	• **Contract Workflows**: ham_admin • **Asset Automation**: ham_admin • **Asset lifecycle category**: ham_admin and sn_hamp.ham_system_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Modules in Configuration Console (continued)

Module	Setup items	Roles required
		• **Asset lifecycle catalog items**: ham_admin and sn_hamp.ham_system_admin • **Asset lifecycle workflows**: admin
	Inventory • **Stockroom types** • **Stockrooms** • **Service locations** • **Distribution channels**	ham_admin and sn_hamp.ham_system_admin
	Asset integrations • **Shipping integration profiles** • **Shipping carrier profiles** • **Zero touch refresh**	ham_admin and sn_hamp.ham_system_admin

For more details on setup using these modules, see Modules in the Configuration Console for HAM.

Configure Hardware Asset Management using the Configuration Console

Configure the Hardware Asset Management application to manage hardware asset lifecycle, inventory, integrations, and team management setup from a centralized console.

Before you begin

The Hardware Asset Management (HAM) application must be installed on your ServiceNow instance.

Role required: To access the Configuration Console, you must have the ham_admin and ia_user roles. The setup items available within the console depend on the additional roles assigned. For more information on roles required for modules, see Configuration Console for Hardware Asset Management.

About this task

The Configuration Console organizes HAM setup into modules. Each module is independent — you can configure the modules and their setup items in any order. The setup items that appear in each module depend on which dependent applications are installed on your ServiceNow instance. If a dependent application isn't installed, its related setup items are hidden automatically.

The **Setup status** section tracks your overall configuration progress. It displays a progress card for each module showing the total number of setup items and how many you have marked as configured.

When you make changes through the Configuration Console, the system captures them in an update set automatically. The update set uses a naming convention defined by the Implementation Agent framework. Child update sets are created for each module's configuration

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

changes under a parent update set. After completing your configuration, you can bundle the update set and apply it to a production instance to replicate the same configuration without repeating the setup manually.

Note: You can also upload an existing update set from another ServiceNow instance on the Product Hub page if you want to replicate a previously completed configuration. Only one XML file can be uploaded at a time.

Procedure

1. Navigate to **Admin** > **Admin Home**.
2. In the **Manage your products** section of the Admin Home page, select the **Hardware Asset Management** card to open the Product Hub.
3. In the Configure your product section, select **Configure**.
   - The Configure Hardware Asset Management page opens in the Configuration Console.
   - The Setup section displays a progress card for each module showing the total number of setup items and how many are configured. The Setup status section tracks your overall configuration progress
   - The Configuration Summary in the navigation menu shows the configuration modules and setup items.

   Tip: To find a specific setup item without expanding modules manually, enter a keyword in the **Search configurations** field at the top of the console.

4. Select a module that you want to configure.
   - From the Configuration Summary navigation menu, select a module.
   - From the Setup status section, select **Get started** on the module that you want to configure.

   You can configure the modules and their setup items in any order. For a complete list of modules and setup items, see Modules in the Configuration Console for HAM.
5. After completing a setup item, select **Mark as configured**.

   Note: Marking an item as configured is reversible. You can return to any setup item and change its configuration status at any time.

6. Review the **Setup status** section to confirm the overall configuration progress.
7. **Optional:** To bundle your configuration changes for deployment, select **Package and download**.

   (Optional) The update set is packaged and downloaded as an XML file. Apply this file to a production instance to replicate the same configuration.

Result

- Configured items show a Completed status in the Setup status section. As you complete each setup item and mark it as configured, the progress cards update in real-time. You can use the Setup status section to monitor progress, identify items that aren't yet configured, and return to any item at any time.
- The system captures changes in an Update Set automatically.

  Note: You can apply the Update Set to a production instance to replicate the same configuration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure assignment groups, roles, and users using AI

Use the AI conversational experience in the Configuration Console to configure assignment groups, roles, and users for Hardware Asset Management.

Before you begin

- The Hardware Asset Management (HAM) application must be installed on your ServiceNow instance. For details, see Install Hardware Asset Management from Product Hub.
- The ServiceNow Otto for Hardware Asset Management (HAM) application must be installed on your ServiceNow instance. For details, see Install additional HAM applications using Product Hub.
- The ServiceNow Otto panel must be enabled on your ServiceNow instance. For details, see Enable the ServiceNow Otto panel (Next Experience UI).
- AI Search must be activated on your ServiceNow instance. For details, see the AI Search activation steps in Install ServiceNow Otto for Hardware Asset Management (HAM).

Role required: To access the Configuration Console, you must have the ham_admin and ia_user roles. The setup items available within the console depend on the additional roles assigned. For more information on roles required for modules, see Configuration Console for Hardware Asset Management.

About this task

The Configuration Console includes a **Configure with AI** option that opens a conversation in the ServiceNow Otto panel. You can use this conversational interface to complete the following setup tasks without navigating to individual modules:

- Configure assignment groups and roles
- Import users into your ServiceNow instance

Procedure

1. Navigate to **Admin** > **Admin Home**.
2. In the **Manage your products** section of the Admin Home page, select the **Hardware Asset Management** card to open the Product Hub.
3. In the Configure your product section, select **Configure**.
   The Configure Hardware Asset Management page opens in the Configuration Console.
4. Select **Configure with AI**.
   The ServiceNow Otto panel opens and displays the estimated time to complete the full configuration process.
5. Select the task that you want to complete.
   - Select **Start with Assignment groups (Team management)** to configure groups, assign users, assign roles, or search by org chart.
   - Select **Choose something else** to view all available options, including groups, users, and roles.
6. Based on your selection, follow the prompts in the panel.

Option	Description
Assignment groups (Team management) or Roles (Team management)	Select one of the following options or enter a natural-language prompt:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
	○ **Assign user(s) to a group** ○ **Assign user(s) to a role** ○ **Assign role(s) to a group** ○ **Create Group** ○ **Search by Org Chart**
Users (Team management)	Select a data source (File or LDAP) and follow the prompts to import users into your Service Now instance.

7. Respond to the follow-up questions and provide any additional information requested in the panel.
8. Review the action summary and select the required action.
   - **Yes**—Confirm the action.
   - **Change details**—Modify the information you provided.
   - **Cancel** — Cancel the action.
9. When prompted for confirmation, select **Yes** to proceed or **No** to cancel.
10. When the assistant displays a success message, select the required option.
    - **Do something else**: Return to the task selection to complete another configuration.
    - **No further assistance**: End the conversation. The assistant then asks if you want to mark the step as configured.
11. When prompted, select how to proceed with the configuration step.
    - To mark the step as complete immediately, select **Mark as configured**.
    - To mark the step as complete later, select **Mark later** and return to the Configuration Console to complete this action manually.

Result

- The AI agents complete the requested configuration and create or update the relevant records in your ServiceNow instance.
- Assignment group, users, and role configuration changes appear in the Team management module of the Configuration Console.

Opt-in to the Hardware Asset Management Content Service

Opt in to the Hardware Asset Management Content Service to improve the normalization process by sharing hardware and consumable model data from your organization with ServiceNow.

Before you begin

Role required:

- ham_admin: for non domain separated instance
- ham_admin plus domain_admin: for domain separated instance

About this task

By opting in to the Hardware Asset Management Content Service, your data is securely shared with ServiceNow to build the content service repository. Adding to the content service allows more models be normalized automatically. These updates occur weekly.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The content updates are based on data from the hardware and consumable models, lifecycles, and custom hardware product models sent back to the Hardware Asset Management Content Service.

Any data that is retrieved by the content service remains anonymous and secure, following ServiceNow privacy policies. After the data has been reviewed, it is properly disposed of.

Procedure

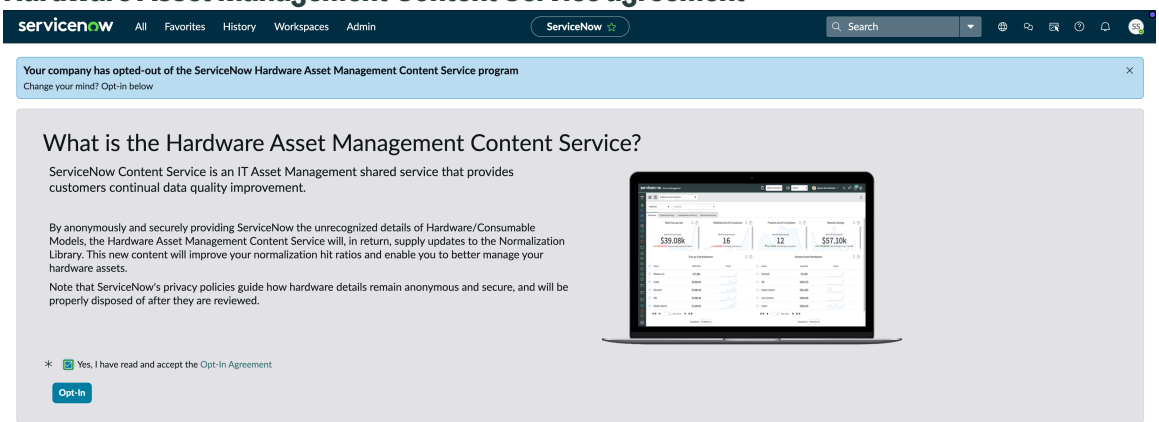
1. Navigate to **All** > **Asset** > **Administration** > **Hardware Model Normalization** > **Content Service Setup**.
2. Read the Hardware Asset Management Content Service agreement.
3. Select **Yes, I have read and accept the Opt-In Agreement**.
4. Click **Opt-in**.
5. If there is any hardware model, consumable model, or lifecycle data that you want to exclude, toggle the option on the Content Service Setup form.
6. Click **Save**.

Example: Opt-in to the Hardware Asset Management Content Service

Your organization has decided to enable the Hardware Asset Management Content Service.

Navigate to the Content Service Setup module and review the Hardware Asset Management Content Service agreement.

Hardware Asset Management Content Service agreement

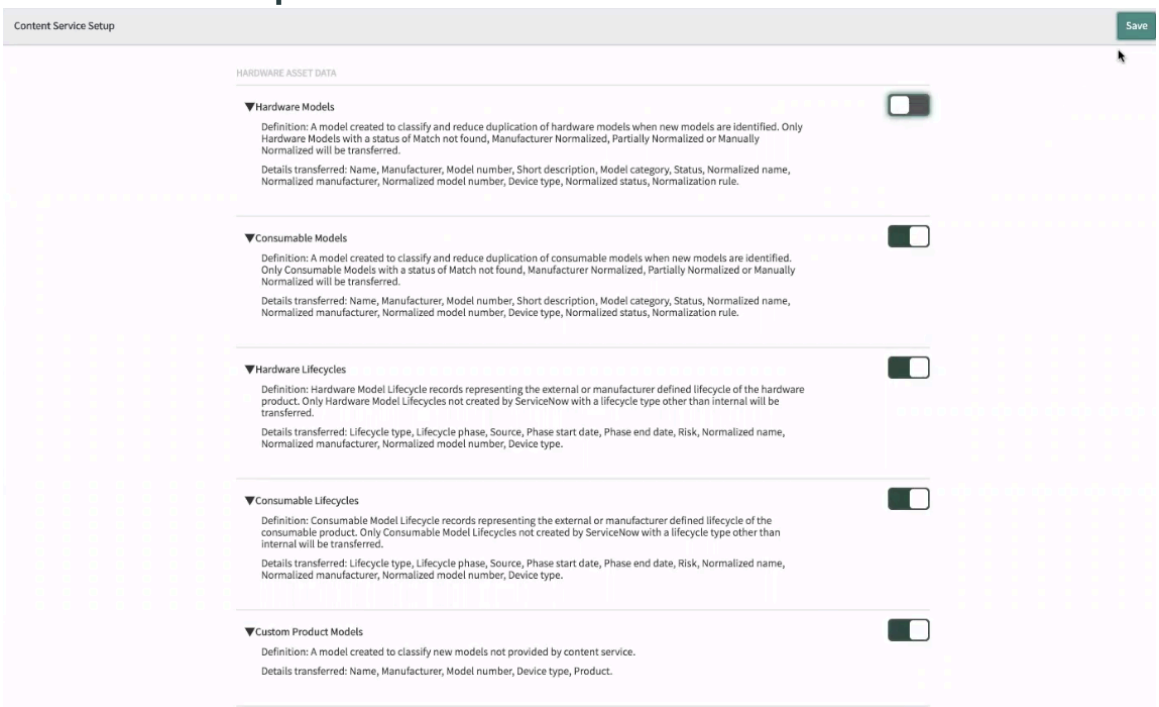


Select **Yes, I have read and accept the Opt-In Agreement** to display the Content Service Setup page.

You decide that you don't want to send hardware model data to the Hardware Asset Management Content Service. Toggle the button next to Hardware Models to opt out of sending the hardware model asset data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Content Service Setup

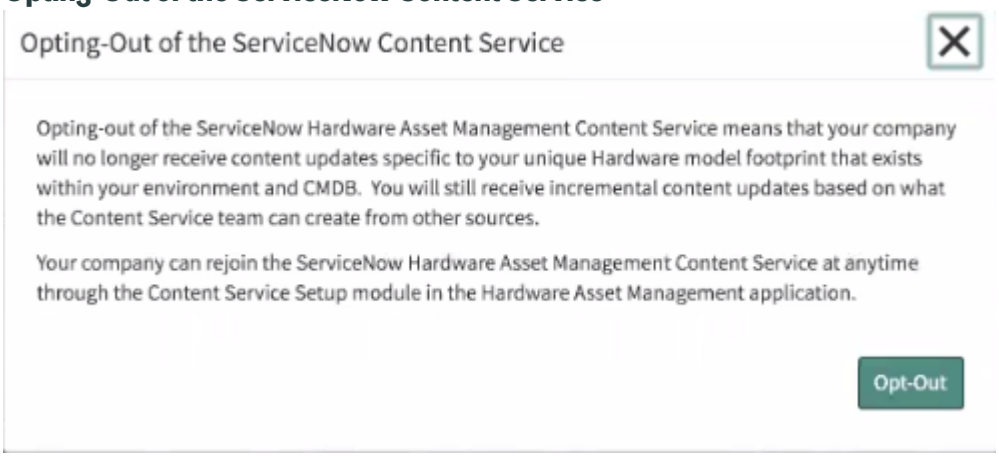


Click **Save**.

Your organization has decided that they don't want to send any of their data and they want to opt-out of the Hardware Asset Management Content Service. To stop sending your data, toggle all the buttons off.

A message appears verifying that you want to opt-out of using the Hardware Asset Management Content Service.

Opting-Out of the ServiceNow Content Service



Click **Opt-Out**.

You are returned to the Hardware Asset Management Content Service agreement and you can opt back in at anytime.

Import and export content data

Import content data from or export content data to the Hardware Asset Management content library service to support hardware normalization of asset models. On-premise users can import or export data via a zip file using the Manage Hardware Library module.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required:

- ham_admin
- domain_admin (if domain separation is enabled)

Procedure

1. Navigate to **Modules** and search for **Manage Hardware Library**.
2. Open the Manage Hardware library form layout and select the **Active** check box to activate the module.
3. Select **Save** and refresh the form layout.
4. Navigate to the Manage Hardware Library module.
5. Import the content data to get the new data into your system.

   a. Select **Import Hardware Library Content**.

   b. Select **Attach Content File** and then select the zip file that contains the content.

   c. Select **Run Import**.
   After the data is imported, the content update schedule job, *`HAM - Apply latest content changes`*, is triggered to process the content updates.

6. Export content to send the custom data or any hardware models that are not fully normalized to the ServiceNow content service team.

   a. Select **Content Service Opt-in: Export Hardware Normalization Content**.

   b. If you already haven't opted in to share the data with ServiceNow content service, select **opt-in** and refresh the Manage Hardware Library page.

   c. Select **Run Export**.

   d. After the status changes to Ready for Download, refresh the page.
   A zip file is created and appears at the top of the Manage Hardware Library page. If there is no content to export, an error message appears informing you that no content exists.

   e. Download and send this zip file to the ServiceNow content service team.

Opt-in or opt-out of HAM license resource categories

Opt in the Hardware Asset Management (HAM) license resource categories that are part of the HAM subscription. You can purchase and opt in the resource categories that you use, and you can opt out and not pay for the categories that you don't use.

Before you begin
Role required: admin or HAM admin

About this task
This procedure is a one-time activity. If you’re upgrading from HAM 1.0 or 2.0 version, then all resource categories are by default opted in. The exception is the Mobile Device resource category.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you're a new user, manually opt in all the resource categories that are part of the HAM subscription.

Important: The Mobile Device resource category is only accessible with HAM Mobile Device License entitlement. Resource categories are available irrespective of entitlements in non-production instances. However, in production instances, you would find the resource categories available only with their associated entitlements.

Hardware assets belonging to a category that you don't opt in are excluded by default. For example, if you don't opt in for the End User Computer category, all End user computers would be excluded. For more information, see Hardware Asset Management license exclusion.

Note: All the HAM license resource categories are opted in by default when you load demo data in an instance. You must deselect the resource categories that you don't want to opt in for.

Procedure

1. Navigate to **All** > **Asset** > **Hardware Model Normalization** > **HAM Resource categories**.
2. Open a resource category.
   Each resource category lists the model categories associated with it.
3. To opt in or opt out of the resource category, do one of the following:
   - If you want to opt in the resource category, select **Opt in**.
   - If you want to opt out of the resource category, select **Opt out**.

   A pop-up message appears and asks if you want to opt in or opt out.
4. Select **Ok**.

Result

The resource category is opted in or opted out. A one time run job execution executes the following updates:

- Sets the License opt in column on the models that have the model categories belonging to the opted in or opted out resource categories.
- Sets the exclusion flag on the assets of these models. For more information, see Hardware Asset Management license exclusion.
- A normalization job is triggered for the models that are associated with the resource category.

Exclude assets

Exclude an asset for which you don't want to use Hardware Asset Management licensed features.

Before you begin

Role required: admin

About this task

You can only exclude assets whose resource category is opted in to Hardware Asset Management licensed features.

Procedure

1. Navigate to **Hardware Asset Workspace** > **Asset estate** > **Hardware assets**.
2. Select a hardware asset that you want to exclude.
3. On the asset form, select the **Exclude from HAM features** check box.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

The **Exclude from HAM features** check box is automatically selected under these conditions:

- If the hardware asset belongs to a resource category that's opted out of Hardware Asset Management licensed features.
- If the hardware asset belongs to a custom model category whose parent model category is associated with an opted-out resource category.

4. Select **Save**.

Note: To exclude assets using other criteria — for example, a specific model — select the **Exclude from HAM features** check box on each asset record manually. You can't exclude assets automatically using custom criteria.

Result
The asset is excluded from using the licensed Hardware Asset Management features.

Update associated Decision tables for HAM flows

Update associated Decision tables for Hardware Asset Management (HAM) flows to trigger a new or customized HAM flow.

Before you begin
Role required: admin, decision_table_admin

Procedure
1. Navigate to **All** > **System Definition** > **Decision Tables**.
2. Open a decision table that you want to update.
3. On the flow page, select the Add icon ( ) in the Decision table section.
4. Select **Add condition column**.
5. In the NEW CONDITION COLUMN dialog box, fill in the conditions according to the conditions that you want to trigger the flow.
6. Select **Done**.
   A new row is created and the condition shows up in the Decision table section.
7. In the Flow column, select the flow that you have created.
8. Select **Save**.
9. Navigate to the Decisions (sys_decision_question) table and search the updated Decision table that you updated.
10. Update the **Order** field with a value less than 100.

Configure stockrooms

Stockrooms are physical locations where hardware assets are stored before deployment or after return. Configure stockrooms before stockroom technicians begin receiving assets, fulfilling requests, or running inventory audits.

Complete the following tasks with the inventory_admin role to configure a stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configuration details

Configuration task	Purpose	Required
Create a stockroom	Creates the stockroom record that defines the name, type, and location of the stockroom	Yes
Create a stockroom type	Defines a custom stockroom type when default types don't meet your organization's needs	If needed
Create a stock rule	Sets minimum and maximum inventory thresholds to trigger automatic replenishment orders	Yes
Associate a stockroom with service locations	Determines which locations the stockroom serves for asset sourcing	Yes
Link stockrooms into a distribution channel	Controls automated stockroom selection when fulfilling asset requests	Yes
Configure stockroom auto-sourcing	Enables AI agents to source hardware assets automatically from the stockroom	If using agentic workflow for sourcing hardware requests
Remove service locations	Removes service locations that the stockroom no longer supports	If needed
Exclude a stockroom from service locations	Prevents a stockroom from appearing in the Stockrooms missing service locations actions card in the Inventory view	If needed
Exclude a stockroom from distribution channels	Prevents a stockroom from appearing in the Stockrooms missing distribution channels actions card in the Inventory view	If needed
Delete a stockroom with assets	Removes a stockroom record that contains assets	Only when removing a stockroom
Delete a stockroom with no assets	Removes a stockroom record with no remaining assets	Only when removing a stockroom

Create a stockroom

Create stockrooms to assign places to assets.

Before you begin

Role required: inventory_admin

About this task

Stockrooms are separate, standalone entities in the Asset Management application. When stock is low on a particular asset, stock rules can notify an asset manager, or automatically transfer inventory from one stockroom to another.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Create a stockroom.

Interface	Action
Core UI	**a.** Navigate to **All** > **Inventory** > **Stock** > **Stock rooms**. **b.** Select **New**.
Hardware Asset Workspace	**a.** Navigate to **All** > **Hardware Asset Work space** > **Inventory**. **b.** Select **All stockrooms**. **c.** Select **New**.

2. On the form, fill in the fields.

Create New Stockroom form

Field	Description
Name	Display name of the stockroom type.
Assignment group	Group that primarily uses the stockroom.
Location	Physical location of the stockroom.
Type	Type of stockroom, such as Field Agent or On site.
Manager	Person in charge of the stockroom. Receives restocking notifications and requests for the stockroom's stock rules.

3. Select **Save**.

Result
The stockroom is added to the list shown in the All stockrooms tab.

Create a stockroom type

If you need stockroom types that are not included in the base system, you can create a custom stockroom type.

Before you begin
Role required: inventory_admin

About this task
Check the priority level of the stockroom types provided in the base instance to ensure that you assign the correct priority level to any new stockroom types you create. You can also modify the stockroom types included in the base system.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Inventory** > **Stock** > **Stockroom Types** and create a record (see table for field descriptions).

Field	Description
Name	Display name of the stockroom type.
Description	General information about the stockroom type.
External stockroom	Whether stockrooms of this type are managed internally (check box cleared) or managed externally by a third party (check box selected).
Priority	Level of precedence for this type of stockroom.
Shipment required	Option that determines if stockrooms of this type require shipment by default.
Value	Internal identifier of the stockroom type.

2. Select **Submit**.

Create a stock rule

Create a stock rule to control what happens when the inventory of a particular asset in a particular stockroom reaches a specified threshold.

Before you begin
Role required: inventory_admin

Procedure

1. Create a stock rule.

Interface	Action
Core UI	**a.** Navigate to **All** > **Inventory** > **Stock** > **Stock Rules**. **b.** Select **New**.
Hardware Asset Workspace	**a.** Navigate to **Asset operations** > > **Inventory**. **b.** From the Inventory list, select **Stock rules**. **c.** Select **New**.

2. On the form, fill in the fields.

Create New Stock Rule form

Field	Description
Model	Product model to which the rule applies.
Threshold	Quantity that the stock must reach to trigger restocking. For example, enter a threshold of 10 for a laptop computer that should be restocked when inventory drops below 10 in the specified stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If a stock rule is created for a hardware or software model reaches the threshold limit, a notification is sent to the stockroom manager and a stock order request is automatically created.
Restocking option	Location where additional supplies should come from. If Procurement isn't active, then restocking option is **Stockroom** only. Otherwise, select one of the following: ○ **Stockroom**: Creates a transfer order to obtain the asset from another stockroom. **Note:** Transfer orders are created only when the parent stockroom meets the following conditions: ▪ Has inventory in the Available state (Reserved, Pending Install, and similar states don't qualify) ▪ Has available inventory equal to or greater than the full restocking quantity, not just the raw shortfall. The restocking quantity rounds the shortfall (threshold minus current stock) up to the nearest order size multiple. For example, if the shortfall is 1 unit but the order size is 5, the parent stockroom must have at least 5 units available. Having 1 to 4 units available does not trigger a transfer. ○ **Vendor**: Sends an email to the stockroom manager to order from a vendor. In addition to the email notification, a purchase order and purchase order line item are created. **Important:** Once a transfer order, purchase order, or purchase order line item is created, it's important to act on it promptly. Any email notifications or reminders won't be sent for these actions.
Active	Option for enabling the stock rule for restocking automatically.
Stockroom	Current physical location of the asset.
Order size	Minimum order quantity for stockroom transfers or vendor purchases. ServiceNow calculates the smallest multiple of the order size needed to restock the item above the threshold. For example, there are 3 laptops in stock with a threshold of 10 and the **Stockroom** option selected. If the order size is set to 4, the system creates a transfer order for 8 laptops to exceed the threshold and satisfy the rule (3 in stock + 8 ordered = 11). When restocking from a vendor, ServiceNow sends an email to the stockroom manager showing the total number of items to order, as multiples of the order size. **Note:** The order size threshold applies only to automated stock rule transfers. Manual transfers don't have this restriction and can move any available quantity from the parent stockroom.

3. Select **Submit** or **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The stock rule that you created appears in the **Stock rules** tab.
- If the restocking option was set to **Vendor**, the following changes happen:
  - The **Stock orders** tab is displayed. All the stock orders that are created using this stock rule are listed under the Stock orders tab.
  - A Request Item of item type Hardware Inventory Stock Order is automatically created. For more information, see Create an inventory stock order request.
- If the restocking option was set to **Stockroom**, the **Transfer orders** tab will be displayed. All the transfers orders created using this stock rule are listed under the **Transfer orders** tab.

> **Note:** For stock orders created through the restocking by a vendor, the stock order tab shows all stock orders generated by that stock rule. But for transfer orders, the tab only displays transfer orders after the upgrade.

Related topics

Stock rules

Associate a stockroom with service locations

Manage sourcing requests that consume from local stockrooms effectively by associating your stockroom with multiple service locations. Optimize your loaner asset workflow and automated asset tasks by serving multiple locations using a single stockroom.

Before you begin

Role required: inventory_admin

About this task

> **Note:**
>
> You can't add service locations to a stockroom that is excluded from providing location coverage. For more details, see Exclude a stockroom from service locations.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom that you want to associate with service locations.
4. Select the **Service locations** tab.
5. Select **Add**.
6. In the Add service locations dialog box, select the active locations that you want the stockroom to support and select **Add**.

   When you add a parent location, all its child locations are also supported by the stockroom. For example, when you add the city San Francisco, the stockroom supports all the locations within San Francisco.

   > **Note:** If the Active check box isn't selected, the stockroom doesn't support that location, or its child locations so that location can't be added to the stockroom.

Result

The selected locations are added to the list shown in the **Service locations** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

- Source requests from local stockrooms
- Request a loaner asset
- Create a transfer order from a request
- Asset life-cycle automation

Link stockrooms into a distribution channel

Link two geographically related stockrooms to create a distribution channel and make the distribution of assets more efficient. You can assign a preference order for each channel to source assets to the stockroom.

Before you begin

Role required: inventory_admin

About this task

A distribution channel is a defined sourcing relationship between two geographically related stockrooms. It determines which stockroom assets are drawn from or transferred to when fulfilling requests, and in what order of preference. Setting up distribution channels helps streamline asset distribution across your organization by automating sourcing decisions rather than handling them manually.

Each distribution channel is created from the perspective of the base stockroom — the stockroom you're configuring. The Function field describes the direction of asset flow relative to the base stockroom:

- Inbound: Assets flow into the base stockroom. The channel stockroom is the source.
- Outbound: Assets flow out of the base stockroom. The channel stockroom is the destination.

When you create a distribution channel, the function is automatically set to Inbound for the base stockroom and Outbound for the channel stockroom.

Note:

You can't create distribution channels for a stockroom that doesn't support sourcing assets through distribution channels. For more details, see Exclude a stockroom from distribution channels.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom for which you want to create a distribution channel.
4. Select the **Distribution Channel** tab.
5. Select **New**.
6. On the form, fill in the fields.

Create New Stockroom Distribution Channel form

Field	Description
Base stockroom	Name of the stockroom for which you want to create a distribution channel. This field is automatically populated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Channel stockroom	Name of the stockroom that you want to link to the base stockroom to create a distribution channel for sourcing assets.
Rank	Numeric order of preference given to the distribution channel for sourcing assets.
Function	Function of the distribution channel. This field is read-only and is automatically set to Inbound.
Active	Option that indicates whether the distribution channel is active for sourcing assets to the base stockroom. **Note:** When you clear the **Active** check box, the outbound function of the base stockroom for that channel stockroom also becomes inactive automatically.

7. Select **Save**.
8. Repeat steps 4–7 to create another distribution channel for this base stockroom.

Result

- The distribution channel is added to the list shown in the **Distribution Channel** tab.
- The base stockroom is added as an outbound distribution channel for the channel stockroom. The **Function** field of the base stockroom is set to **Outbound**.

Related topics

Create a transfer order from a request

Source requests from local stockrooms

Configure a stockroom for automated sourcing by AI agents

Configure a stockroom to enable AI agents in the Manage hardware asset requests agentic workflow to source hardware assets automatically.

Before you begin

Role required: ham_admin

About this task

Important: Configuring the stockroom is necessary for AI agents to source the hardware asset requests from it. However, to automate your hardware asset requests using the Manage hardware asset requests agentic workflow, you must install the ServiceNow Otto for Hardware Asset Management (HAM) application. For more details, see ServiceNow Otto for Hardware Asset Management (HAM).

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom that you want to set up for automatic sourcing.
4. Select the automatic sourcing options in the **Sourcing by AI agents** section.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- To enable the AI agent to consume the local stock automatically, select the **Auto-consume** check box.
- To enable the AI agent to create a transfer order for the stockroom automatically, select the **Auto-transfer** check box.
- To enable the AI agent to create a purchase order for the stockroom automatically, select the **Auto-purchase** check box.

5. Select **Save**.

Result
The stockroom is configured for the automatic sourcing options that you selected.

Remove service locations

Remove service locations when the associated stockroom doesn't support those locations.

Before you begin
Role required: inventory_admin

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom for which you want to remove the supported locations.
4. In the **Service locations** tab, select the locations that you want to remove and select **Remove**.

Result
The removed locations are no longer shown in the Service locations list.

Exclude a stockroom from service locations

Exclude a stockroom from service locations so that the stockroom isn't shown in the Stockrooms missing service locations important actions card in the Inventory view.

Before you begin
Role required: inventory_admin

About this task

Note: You can't exclude a stockroom that already has associated service locations. You must first remove the associated service locations and then exclude the stockroom from service locations. For more details, see Remove service locations.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of available stockrooms, select the stockroom that you want to exclude from service locations.
4. Select the **Exclude from service locations** check box.
5. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The stockroom isn't shown in the Stockrooms missing service locations important actions card even if the stockroom doesn't support service locations.
- The **Service location** tab doesn't show the **Add** option for adding service locations to the stockroom.

Exclude a stockroom from distribution channels

Exclude a stockroom from distribution channels so that the stockroom isn't shown in the Stockrooms missing distribution channels important actions card in the Inventory view.

Before you begin

Role required: inventory_admin

About this task

Note: You can't exclude a stockroom that is already linked into any distribution channel.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of available stockrooms, select the stockroom that you want to exclude from distribution channels.
4. Select the **Exclude from distribution channels** check box.
5. Select **Save**.

Result

- The stockroom isn't shown in the Stockrooms missing distribution channels important actions card even if the stockroom isn't linked into distribution channels.
- The **Distribution Channel** tab doesn't show the **New** option for creating a distribution channel for the stockroom.

Delete a stockroom with assets

You can delete a stockroom. If the stock room has assets, you must remove the assets from the stockroom first.

Before you begin

Role required: inventory_admin

Procedure

1. Navigate to **All** > **Asset** > **All Assets**.
2. Personalize the list to add the **Stockroom** column.
3. Filter the list to show only the assets in the stockroom that you want to delete.
4. Change or remove the stockroom for all of the asset records.
5. After removing assets from the stockroom you want to delete, continue with the instructions for deleting a stockroom with no assets.

Delete a stockroom with no assets

You can delete a stockroom that has no assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Incomplete transfer orders must be deleted before you delete the stockroom.

Role required: inventory_admin

Procedure

1. Navigate to **All** > **Inventory** > **Stock** > **Stockrooms**.
2. Select the check box beside the stockroom name.
3. In the **Actions** list, select **Delete**.

Note: Transfer order history is deleted when you delete the stockroom.

Integrations and advanced configuration

Configure HAM integrations and advanced settings to connect external carriers, enable Zero Touch workflows, track cost and performance, define success goals, and manage charity organizations for asset disposal.

Configuration details

Configuration task	Configuration scope
Configure Hardware Model Normalization	Hardware Model Normalization and normalization settings for hardware and consumable models.
Configure HAM success goals	Measurable targets, automated actions, and goal categories for your asset management priorities.
Configure total cost of ownership	Labor task rates and task types for calculating the full cost of deploying, maintaining, and retiring assets.
Configure asset performance KPI settings	Operational tracking schedules and settings for measuring uptime and utilization for hardware assets.
Configure integration framework to track shipments	Carrier API connections through integration profiles and script includes for automatic shipment status updates on transfer orders and stock requests.
Configure the Zero Touch request flow	Service Exchange connection, service catalog items, and integration profile or routing and fulfilling employee hardware requests through an external provider.
Configure Zero Touch Refresh flow	Service Exchange connection between your ServiceNow instance and a provider ServiceNow instance for transmitting and fulfilling Zero Touch asset refresh requests.
Configure the Lenovo Warranty API connection	Connection and credential for accessing the Lenovo Warranty API.
Configure charity organization for asset donation	Charity organizations available for donating assets.
Configure the Manage contract repository agentic workflow for HAM	Generative AI skills for the Manage contract repository agentic workflow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure Hardware Model Normalization

Hardware Model Normalization standardizes manufacturer, model, and model number data across asset records using the Hardware Asset Management Content Service. Normalized data improves the accuracy of asset reporting, lifecycle planning, and cost analysis. Configure hardware normalization before asset managers begin creating or managing hardware models.

When you opt in to Hardware Model Normalization, HAM compares asset model data against the Content Library and applies standardized values for manufacturer name, model name, model number, and end-of-life and end-of-support dates. You can also create custom models for hardware asset that is not available in the Content Library.

Configuration details

Configuration task	Purpose	Required
Create a hardware or consumable model	Creates a model record for a hardware or consumable asset	Yes
Copy a hardware model from the Content lookup portal	Copies a hardware model from the Content lookup portal to the Product Model [cmdb_model] table	If needed
Normalize hardware and consumable models	Runs normalization to apply standardized manufacturer, model, and lifecycle data from the Content Library	Yes
Add a custom product	Creates a custom product if it is not available the Content Library	If needed
Add a custom hardware model	Creates a custom hardware model if it is not available in the Content Library	If needed
Revert normalization of hardware and consumable models	Removes applied normalization and restores original model data	If needed

Related topics

Hardware Model Normalization

Create a hardware or consumable model

To begin tracking your hardware and consumable assets, create a hardware or consumable model. Then, add lifecycle information to keep track of the lifecycle phase of your model.

Before you begin

Role required: admin or asset

Procedure

1. Navigate to one of the following paths.
   - **Product Catalog** > **Product Models** > **Hardware Models**
   - **Product Catalog** > **Product Models** > **Consumable Models**
2. Click **New**.
3. Complete the following steps if you are adding a hardware model.
   a. On the Hardware Model form, click the **Consumable Model Fields** section.
   b. Click **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. To add additional information on the asset, click the Hardware model details.

d. To add unit information, click the Hardware model details.

e. To link a compatible model, click the Compatibles and then click **Add Compatible**.

f. To add a model substitution, click the Substitutes and then click **Add Substitution**.

g. To manually normalize your hardware model, click the Normalization section.

h. To add a configuration item, click the Configuration Items.

i. To add your model to the Product Catalog, click the Hardware model details.

j. To publish the model to the Hardware Catalog, click the **Publish to Hardware Catalog** related link.

k. To add related assets, click the Hardware model details.

l. To add a model component, click the Model Components.

m. To add vendor information to your model, click the Vendor Catalog Items and click **New**.

n. To add lifecycle information, click the Hardware Model Lifecycles, click **New**.
If a lifecycle with the same source, lifecycle type, lifecycle phase, and source exits, an error message appears.

Note: While you can delete lifecycles that you've added, you can't delete lifecycles that are created from the Hardware Asset Management Content Service.

4. Complete the following steps if you are adding a consumable model.

a. On the Consumable Model form, the fill in the details.

b. Click **Save**.

c. To add additional information on the consumable asset, click the Hardware model details.

d. To add your model to the Product Catalog, click the Hardware model details.

e. To add vendor information to your model, click the Vendor Items related list.

f. To add lifecycle information, click the Consumable Model Lifecycle related list and click **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If a lifecycle with the same source, lifecycle type, lifecycle phase, and source exits, an error message appears.

Note: While you can delete lifecycles that you've added, you can't delete lifecycles that are created from the Hardware Asset Management Content Service

5. Click **Submit**.

Result

The model appears in either the Hardware Model or Consumable Model list.

Note: If you want to exclude this model from the Hardware Asset Management Content Service, select the **Exclude from content service** option.

Example: Create a hardware model

You've purchased the ThinkPad T43 and you need to begin tracking the asset.

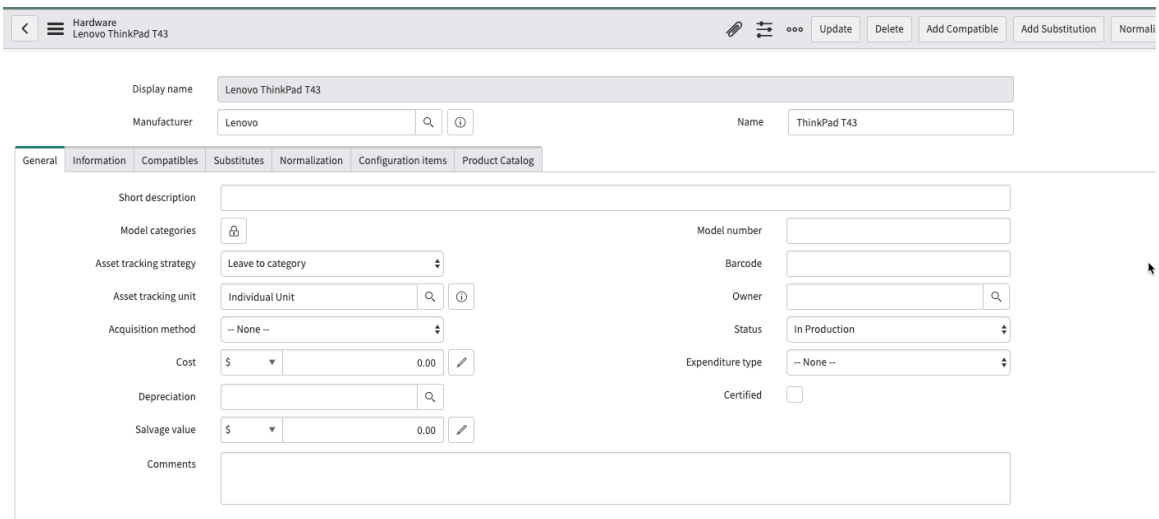
To begin tracking your asset, add the following information to the Hardware form.

Field	Description
Manufacturer	Lenovo
Name	ThinkPad T43

Click **Save**.

The **Display name** field is updated with the name of the manufacturer and the name of the hardware.

Hardware form



Currently, the Lenovo ThinkPad T43 is generally available. Add the lifecycle status to accurately track the phase of the asset.

Click the Hardware Lifecycle Model related list and click **New**. Add the following information to the Hardware Model Lifecycle form.

Field	Description
Lifecycle type	General Availability

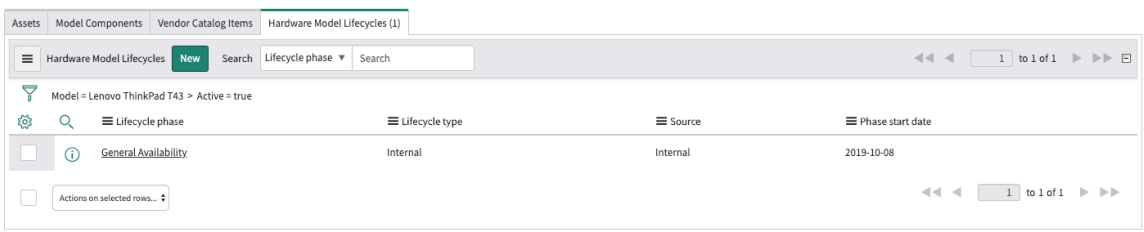
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Phase start date	2019-10-08
Phase end date	2019-10-31

Click **Submit**.

The lifecycle is added to the record.

Hardware Model Lifecycles



When the general availability phase is over, the ThinkPad T43 will be discontinued. Add the end of life information to the asset to accurately track the lifecycle.

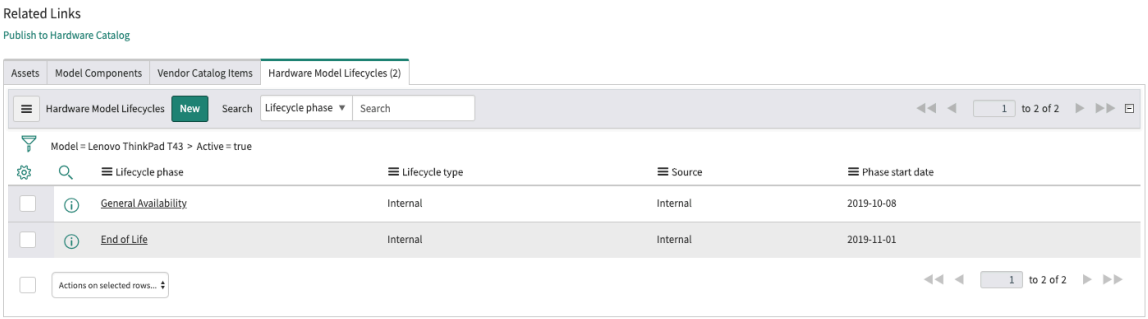
Click the Hardware Lifecycle Model related list and click **New**. Add the following information to the Hardware Model Lifecycle form.

Field	Description
Lifecycle type	End of Life
Phase start date	2019-11-01
Phase end date	2019-11-30

Click **Submit**.

The End of Life lifecycle is added to the record and both lifecycle phases are displayed in the Hardware Model Lifecycle related list.

Lifecycle phases in the Hardware Model Lifecycles list



What to do next

After you've added your hardware or consumable models, you can normalize the data.

Copy a hardware model from the Content lookup portal

Copy a hardware model record from the Content lookup portal to add a new model entry to the Product Model [cmdb_model] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: asset and model_manager

About this task
You can create a product model record by duplicating an existing model from the Content lookup portal. The duplicated model is normalized and relevant fields are automatically populated from the source record. If a record with the same manufacturer, name, and model number exists in the Product Model [cmdb_model] table, you can't duplicate the model record.

Procedure
1. Navigate to *Hardware Asset Workspace* > **Content lookup**.
2. Search for a hardware model record.
3. Open the Model details form by selecting the model number.
4. Select **Copy model details**.
5. On the form, fill in the fields.

Create model from copied form

Field	Description
Model type	Type of the model.
Model categories	Model categories that the model can be associated with. Model categories are used to create configuration items (CIs) and assets.

6. Select **Create new model**.
   A confirmation message is displayed.

Result
The model record is created and you're redirected to the Model record form.

What to do next
- To publish the model to the Hardware Catalog, select **Publish to Hardware Catalog**. For more information about publishing the model to the hardware catalog, see Publish an item to the hardware catalog.
- To revert the normalization of the hardware or consumable model, select **Revert Normalization**. For more information about reverting normalization, see Revert normalization of hardware and consumable models.
- To save the changes made to the model record, select **Save**.

Related topics
Create a hardware or consumable model

Content lookup portal for Hardware Asset Management

Normalize hardware and consumable models
After you have created your hardware and consumable models, normalize the information of the model.

Before you begin
Role required: admin, asset, or model_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Note:

- If you have opted in to the Hardware Asset Management Content Service, you can override any life cycle values that were added from the schedule job, or you can manually add your own life cycles.
- For a model to be fully normalized, you must add manufacturer details and a model number, and optionally a model name.
- If you update the **Device Type** field, the normalization status is updated.

Procedure

1. Create a hardware or consumable model.

Interface	Action
Core UI	**a.** Navigate to one of the following paths. ▪ **Product Catalog** > **Product Models** > **Hardware Models**. ▪ **Product Catalog** > **Product Models** > **Consumable Models**. **b.** Select **New**. **c.** On the Hardware Model or Consumable Model form fill in the details. **d.** Select **Save**.
Hardware Asset Workspace	**a.** Navigate to **Workspaces** > **Hardware Asset Workspace** > **Model management**. **b.** Select the type of model that you want to create. ▪ For hardware models, select the **Hardware models** tab. ▪ For consumable models, select the **Consumable models** tab. **c.** Select **New**. **d.** On the Hardware model or Consumable model form, fill in the details. **e.** Select **Save**.

If the information is available, the model is compared against the data in the Hardware Normalization Content Service, and the model is normalized.

Note: If the hardware or consumable model is normalized against the Hardware Asset Management Content Service, a life cycle is added if applicable life cycles exist in the content service.

2. Normalize your model manually if the normalization status of your model is Partially Normalized or Publisher Normalized.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Core UI	Select the **Normalized** section and **Consumable Model Fields** section to normalize the model manually.
Hardware Asset Workspace	**a.** Navigate to **Workspaces** > **Hardware Asset Workspace** > **Model management**. **b.** Select the type of model that you want to normalize. ▪ For hardware models, select the **Hardware models** tab. ▪ For consumable models, select the **Consumable models** tab. **c.** Select the model. **d.** Select **Normalize**.

3. Select **Save**.
   The **Normalization Status** field is updated.

Example: Normalize a hardware model

You have created a hardware model for the Lenovo ThinkPad T43 and you want your asset information to be consistent across the organization.

Review the normalization status of the model by reviewing the **Normalization** section.

The normalization status is set to Partially Normalized because the name of the model is missing.

In the **Model** field, enter `2687DTU`.

Select **Save**.

The **Normalization Status** field displays **Manually Normalized**.

Add a custom product

If you have a product that is not represented in the Asset Management Content Service yet, you can create a custom product.

Before you begin

Role required: ham_admin

Procedure

1. Navigate to **All** > **Asset** > **Administration** > **Custom Products**.
2. Click **New**.

Field	Description
Name	Name of the custom product.
Manufacturer	Name of the manufacturer.
Description	Description of the product.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Device type	Type of device.
Active	Option that indicates the product is active.
Exclude from content service	Option that indicates that the product will be excluded from the content service.

3. Click **Submit**.

What to do next
After you've created the hardware model, normalize the model.

Add a custom hardware model

If you have a hardware model that isn't represented in the Asset Management Content Service yet, you can create a custom model.

Before you begin
Role required: ham_admin

Procedure
1. Navigate to **All** > **Asset** > **Administration** > **Custom Models**.
2. Click **New**.

Custom Hardware Model Library form

Field	Description
Model number	Number associated with the hardware model.
Product	Name of the product.
Description	Description of the hardware model.
Name	Name of the model.
Active	Option that indicates the model is active.
Exclude from content service	Option that indicates the model is excluded from being sent to the content service.

3. Click **Submit**.

What to do next
After you've created the hardware model, normalize the model.

Revert normalization of hardware and consumable models

Revert the normalization of hardware and consumable models in the Hardware Asset Workspace.

Before you begin
Role required: Users with asset or model_admin role (without Domain separation), asset or model_admin and domain_admin (with Domain separation).

Note: The model_admin role is available only if the OT Asset Management application is activated on your ServiceNow instance. This role enables you to revert the normalization status of OT hardware models. For more details on OT assets, see OT Asset Workspace. The model_admin role includes the mode_manager sub-role.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Hardware and consumable models with a status of **Fully Normalized**, **Partially Normalized**, **Manufacturer Normalized**, or **Manually Normalized** can be reverted.

Procedure

1. Navigate to a normalized hardware or consumable record.

Interface	Action
Core UI	○ For hardware models, navigate to **All** > **Product Catalog** > **Product Models** > **Hardware models**. ○ For consumable models, navigate to **All** > **Product Catalog** > **Product Models** > **Consumable models**.
Hardware Asset Workspace	○ For hardware models, navigate to **All** > **Hardware Asset Workspace** > **Model management** > **Hardware models**. ○ For consumable models, navigate to **All** > **Hardware Asset Workspace** > **Model management** > **Consumable models**.

2. Select a hardware or consumable model record that is already normalized.
3. Select **Revert Normalization** and select one of these options in the confirmation message:
   - To mark your confirmation and proceed with reverting model normalization, select **Proceed**.
   - To dismiss the model normalization revert, select **Cancel**.

Result

After the revert normalization process is complete, the following changes take place:

- All the normalized fields present in the model are reverted and the normalization status changes to **Match not Found**.
- Fields are reset to their original values and any rule associated with the model is deactivated.
- After deactivation of the rule, revert normalization is run on all models that were normalized using that rule before.
- The deactivated rule can no longer normalize any more models. The deactivated rule can't be reactivated. It’s a one-time procedure.
- The **Revert Normalization** option on the model record is replaced with the **Normalize** option.

Configure HAM success goals

Track the success of the Hardware Asset Management application in your instance by creating success goals. You can also create a success goal category for a success goal and track the success of your goals by creating success activities.

A success goal defines a measurable outcome your organization wants to achieve, such as increasing normalization coverage or reducing unmanaged assets. Success activities are the specific steps that contribute to achieving a goal. Success categories group related goals for reporting and workspace display.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configuration details

Step	Task	Purpose
1	Create a success goal	Defines a measurable HAM maturity target for your organization.
2	Create success activities	Defines a specific step that contributes to achieving a success goal
3	Create a success goal category	Groups related success goals for reporting and workspace display

For more details, see Success portal view in Hardware Asset Workspace and View all maturity items for Hardware Asset Management.

Create a success goal for Hardware Asset Management

Create a success goal to track the success of the Hardware Asset Management application in your instance.

Before you begin
Role required: ham_admin

Procedure

1. Navigate to one of the following paths.
   - **Hardware Asset Workspace** > **Success portal**
   - **Hardware Asset Workspace** > **Asset operations** > **Success goals**
2. Select **Create success goal** or **New**.
3. On the form, fill in the fields.
   For a description of the field values, see HAM Success Goal Details.
4. Select **Save**.
   If you want to cancel a success goal, select the success goal number and select **Cancel Goal**.

Result
The success goal that you created gets displayed on the Success goals page in the Asset operations view.

Create success activities for HAM success goals

Create success activities to track the success of your created goals.

Before you begin
Role required: ham_admin, asset (owner of the goal)

Procedure

1. Navigate to one of the following paths.
   - **Hardware Asset Workspace** > **Success portal**
   - **Hardware Asset Workspace** > **Asset operations** > **Success activities**
2. Select **Create success activity** or **New**.
3. On the form, fill in the fields.
   For a description of the field values, see HAM Success Activity.
4. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The success activity that you created gets displayed on the Success activities page in the Asset operations view.

Create a success goal category for hardware assets

Create a success goal category to associate it with the Hardware Asset Management success goal.

Before you begin
Role required: ham_admin

Procedure
1. Navigate to **Hardware Asset Workspace** > **Asset operations** > **Success goals** > **Categories**.
2. Select **New**.
3. On the Success Goal Category form, fill in the category that you want to add and select the **Hardware asset category** check box.
4. Select **Save**.

Result
The category that you add gets listed as an option in the **Category** field while creating a success goal for Hardware Asset Management. For more information, see Create a success goal for Hardware Asset Management.

Configure the Total Cost of Ownership of assets

Configure the Total Cost of Ownership (TCO) of assets by creating rate cards for each task in a Hardware Asset Management workflow.

Rate cards capture costs for a task or on the time consumed on the task.

Related topics

Asset Total Cost of Ownership for Hardware Asset Management

Asset analytics view

Create a task rate card in Hardware Asset Workspace

Create a task rate card to define the type of task and the method of calculating the associated costs.

Before you begin
Role required: asset_admin

Activate the ServiceNow® Cost Management (com.snc.cost_management) plugin. For more information, see Activate Cost Management.

Procedure
1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations** > **TCO configuration** > **Task rate card**.
2. Select **New**.
3. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Task Rate Card

Field	Description
Name	Purpose of the rate card.
Use time worked	Option for forcing the rule to calculate the task cost based on the related task time worked entries. By default, a flat rate for each task is defined in the **Task rate** field.
Table	The type of tasks the rate card applies to.
Active	Option to determine if the rate card is actively used.
Task rate	Rate of the task, with a currency list. To add a new currency, use the Edit link.
Default labor rate	The default hourly rate to apply to the time worked entries if the worker doesn't have a labor rate card. This field appears only when **Use time worked** is selected.
Order	Order in which the task rate card applies to the same task. When more than one task rate card applies to the same task, the one with the lowest order is used.
Set conditions	Filter to run on the table selected to determine whether this rate card applies to a given task. This field uses the Condition Count Widget to preview what records would be returned by the conditions.

4. Select **Save**.

Result

After a task rate card is defined for a task, expense lines are created by the **Use time worked** value. When you select the Use time worked field for a task rate card, the time worked records created against users and labor rate are used to calculate expense lines. For more information, see Process task rate cards.

Related topics

- Asset Total Cost of Ownership for Hardware Asset Management
- Asset analytics view
- Asset operations view

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a labor rate card in Hardware Asset Workspace

Create a labor rate card to record the time worked on a task and associate a rate to the task.

Before you begin

Role required: asset_admin

Activate the ServiceNow® Cost Management (com.snc.cost_management) plugin. For more information, see Activate Cost Management.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations** > **TCO configuration** > **Labor rate card**.
2. Select **New**.
3. On the form, fill in the fields.

Create New Labor Rate Card

Field	Description
Name	Purpose of the rate card.
Active	Option to determine if the rate card is actively used.
Hourly rate	Identifies the hourly rate to be applied to task time worked entries when the worker meets the condition defined.
Order	Order in which the labor rate card applies to the same task. When more than one labor rate card applies to the same task, the one with the lowest order is used.
Set conditions	Filter to determine whether the **Use time worked** option applies to this rate card. For more information, see Create a task rate card in Hardware Asset Workspace. This field uses the Condition Count widget to preview what records would be returned by the conditions.

4. Select **Save**.

Result

If you're working on multiple HAM workflows including a labor rate card, the same value is used for all the time recorded tasks. But a labor rate card isn't included, the Default labor rate mentioned in the task rate card is used. For more information, see Create a task rate card in Hardware Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

- Asset Total Cost of Ownership for Hardware Asset Management
- Asset analytics view
- Asset operations view

Configure settings to monitor asset key performance indicators (KPIs) in the Hardware Asset Workspace

Set up the necessary configurations in the Asset operations view to enable the tracking of KPIs for your hardware assets. These settings enable you to monitor and manage the performance your assets.

As an administrator, configure the following settings to monitor asset KPIs:

1. Opt in to model categories to track performance KPIs for hardware assets.
2. Create an operational schedule for hardware assets.
3. Map hardware assets to an operational schedule.

For details on asset performance and the related reports, see Asset performance reports in the Hardware Asset Workspace and Asset analytics view.

Opt in to model categories to track performance KPIs for hardware assets

Monitor the performance KPIs of hardware assets in your organization by enabling the KPI tracking for the models to which the assets belong.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations** > **KPI configuration**.
2. From the KPI configuration list, select **KPI opt in**.
3. From the list of model categories, select the one for which you want to enable the KPI tracking.
4. On the Asset performance tracking form, select the **Track performance KPI** check box.
5. Select **Save**.

Result

Create an operational schedule for hardware assets.

Create an operational schedule for hardware assets

Define the scheduled operational time, which is the duration during which the asset will be in use, by creating an operational schedule.

Before you begin

Role required: asset

About this task

An operational schedule record is stored in the Asset schedule [sn_itam_common_asset_schedule] table. If an operational schedule isn't defined, the Default operation schedule (24/7) hours is applied.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The calculation of asset key performance indicators (KPIs) begins when the asset first moves to the In Use state. Therefore, the linked operational schedule must cover the entire period for accurate results.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations** > **KPI configuration**.
2. From the KPI configuration list, select **Operational schedules**.
3. Select **New**.
4. On the form, fill in the fields.

Create New Operation schedule form

Field	Description
Name	Unique name for the operational schedule.
Parent	Parent schedule that constraints the new schedule. For more details, see Parent and child schedules.
Time zone	Time zone for the schedule. If you select **Floating**, the time zone is relative to whatever process is accessing the item at the time. ○ For example, if an enterprise administrator in Amsterdam sets a floating schedule for 8:00A.M. to 5:00P.M., a user in San Jose sees the schedule as 8:00 A.M. to 5:00 P.M. ○ When a schedule is defined in a specific time zone, users in different time zones see the schedule with their own time zone applied.
Description	Description of the operational schedule.

5. Select **Save**.
6. Add one or more schedule entries to the operational schedule.
   a. Select the **Schedule Entries** tab.
   b. Select **New**.
   c. On the Schedule Entry New record, fill in the fields.

      For details on Schedule Entry New record fields, see Schedule entry fields.
   d. Select **Submit**.

   A schedule entry is created and listed under the Schedule Entries tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

You can't edit a schedule or its entries. If you want to stop using an asset schedule, you can deactivate it by deselecting the **Active** check box. You can then create a new schedule as needed.

7. **Optional:** To view the calendar view of the schedule with the schedule entries, select **Show schedule**.

What to do next

Map hardware assets to an operational schedule.

Map hardware assets to an operational schedule

Create an asset schedule to map the hardware assets to an operation schedule.

Before you begin

Role required: admin

About this task

An asset schedule record is stored in the Asset schedule policy [sn_asset_cmn_schdule_policy] table.

Note: If an asset isn't associated with an operational schedule, the Default asset schedule (24 hours, 7 days a week or 24/7) will be applied.

The *Asset performance - Map schedule policies* job runs weekly to sync the mapping between assets and the operational schedule.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations** > **KPI configuration**.
2. From the KPI configuration list, select **Asset schedules**.
3. Select **New**.
4. On the form, fill in the fields.

Create New Asset schedule form

Field	Description
Name	Unique name for the asset schedule.
Source table	Source table for the assets. You can select any of the following tables: ○ Hardware [alm_hardware] ○ Enterprise asset [sn_ent_asset] ○ Construction asset [sn_ent_construction_asset] ○ Facility asset [sn_ent_facility_asset] ○ Industrial asset [sn_ent_industrial_asset] ○ Linear asset [sn_eam_linear_asset] ○ Medical asset [sn_ent_medical_asset] ○ Retail asset [sn_ent_reatail_asset]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Tactical equipment asset [sn_ent_tactical_asset] ○ Transportation asset [sn_ent_transportation_asset] ○ Wearable asset [sn_ent_wearable_asset]
Condition	Set a condition to select the assets that you want to associate with the operational schedule. For example, if you set the **Department** field to **IT**, the operational schedule is inked to all assets within the IT department. **Note:** Select the source table before setting the condition.
Schedule	Operational schedule that you want to associate with the assets.
Priority	Order in which schedules should be applied to an asset when there are overlapping schedules.
Active	Indicates whether the asset schedule is active.

5. Select **Save**.
6. **Optional:** To sync the mapping between the assets and the operational schedules on demand, select **Sync KPI records**.

Integration framework configuration for shipment tracking

Configure the integration framework for Hardware Asset Management (HAM) to connect to external shipping carriers so that inbound shipments are tracked in real time and asset records are updated automatically when hardware asset arrives.

The following configuration tasks enable shipment tracking for a carrier. For details on requirements for integration with third-party carrier applications, see Managing shipments by integrating with third-party carrier applications.

Configuration details

Step	Configuration task	Purpose	Required
1	Create an integration script include	Defines the logic HAM uses to communicate with the carrier API	Yes
2	Create a carrier integration profile	Stores the carrier API credentials and endpoint details	Yes
3	Associate a shipping carrier with an integration profile	Links a carrier record to its integration profile so HAM knows which profile to use for each carrier	Yes
4	Test the carrier API integration	Validates that HAM can connect to the carrier API and retrieve shipment data	Yes
5	Create a shipping carrier record	Creates the carrier record that HAM associates with shipments	Yes
6	Remove a shipping carrier from an integration profileRemove a shipping carrier	Removes a carrier record that is no longer in use	As needed

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Creating an integration script include for third-party carrier applications

In order to integrate with a ServiceNow instance, a third-party carrier application must have a script include that extends the base class `ITAMShipmentIntegration` script on its ServiceNow instance to receive the shipment tracking number from the customer's ServiceNow instance and respond with the carrier-related details.

Consider the following when you create the script include:

- Make sure that the script include is accessible from the Asset Management Common application scope by adjusting the following settings on the application resource record:
  - Set the **Accessible from** field to **All application scopes**.
  - Set the **Caller Access** field to **None** to make sure the caller access isn't restricted.
- The code for communicating with the customer's ServiceNow instance based on the tracking number must be included within the *`fetchShipmentInfo`* function.
- When the API is invoked in the test mode for validating the connection with the customer's ServiceNow instance, the return response from the *`fetchShipmentInfo`* method should be a JSON object with the HTTP response code and response message, as follows:

```
{
httpResponseCode: 200, httpResponseMessage: 'SUCCESS'
}
```

- When not in the test mode, query the shipments and invoke the *`processResponse`* method with the following response format:

```
[
{
trackingNumber: '',
deliveryDate: '',
pickupDate: '',
packageStatus: ''.
statusDetail: '',
trackingURL: '',
parcelWeight: '',
deliveryServicesCost: '',
currency: ''
}
 ]
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ITAMShipmentIntegration script include sample codes

Sample ITAMShipmentIntegration script include with the default processResponse function provided by the IT Asset Management application

Script

```
var DemoFedexAPI = Class.create();
DemoFedexAPI.prototype = Object.extendsObject(sn_itam_common.ITAMShipmentIntegration, {
    initialize: function() {
    },

    // trackingNumbers: Array of shipment tracking numbers
    fetchShipmentInfo: function (trackingNumbers, mode) {
        var returnObj = {
            httpResponseCode: 0,
            httpResponseMessage: ''
        };
        // Mode = test indicates just check connectivity to API
        // If mode is test, just check the connection
        // Else get the status for the input tracking numbers
        if (mode != 'test') {
            // Make a call to the carrier API - pass the "trackingNumbers"
            // If there are no errors, returnObj.httpResponseCode should be 200, else, set it to the returned error code
            // In case of any error message being returned from API, copy it to returnObj.httpResponseMessage
            // If call is successful, make sure response is in the format as below:
            // array of JSON, where each JSON would have below keys with corresponding values
            // trackingNumber, deliveryDate, pickupDate, packageStatus, statusDetail, trackingURL
            // Then invoke the default function to update shipments
            this.processResponse(responseArray);
        } else {
            // Check the connection to carrier API and return response
            // If connection is successful, returnObj.httpResponseCode should be 200, else set it to the returned error code
        }
        return returnObj;
    },

    type: 'DemoFedexAPI'
});
```

Sample ITAMShipmentIntegration script include with custom processResponse function

Script

```
var DemoUPSAPI = Class.create();
DemoUPSAPI.prototype = Object.extendsObject(sn_itam_common.ITAMShipmentIntegration, {
    initialize: function() {
    },

    // trackingNumbers: Array of shipment tracking numbers
    fetchShipmentInfo: function (trackingNumbers, mode) {
        var returnObj = {
            httpResponseCode: 0,
            httpResponseMessage: ''
        };
        // Mode = test indicates just check connectivity to API
        // If mode is test, just check the connection
        // Else get the status for the input tracking numbers
        if (mode != 'test') {
            // Make a call to the carrier API - pass the "trackingNumbers"
            // If there are no errors, returnObj.httpResponseCode should be 200, else, set it to the returned error code
            // In case of any error message being returned from API, copy it to returnObj.httpResponseMessage
            // If call is successful, make sure response is in the format as below:
            // array of JSON, where each JSON would have below keys with corresponding values
            // trackingNumber, deliveryDate, pickupDate, packageStatus, statusDetail, trackingURL
            // Then invoke the default function to update shipments
            // In case there is a need for handling shipment updates, implement processResponse function like below
            this.processResponse(responseArray);
        } else {
            // Check the connection to carrier API and return response
            // If connection is successful, returnObj.httpResponseCode should be 200, else set it to the returned error code
        }
        return returnObj;
    },

    processResponse: function () {
        // Custom logic for updating shipment records
        // Query shipment table for each tracking number and then update the values from response onto the corresponding columns
    },

    type: 'DemoUPSAPI'
});
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

fetchShipmentInfo function

The `fetchShipmentInfo` function receives the tracking numbers from the ServiceNow instance of the customer and invokes the carrier API to fetch the shipment details for all the tracking numbers. Within this function, you must define the business logic that enables your customers to communicate with your carrier APIs based on the tracking numbers. This function processes the response that is received from the carrier API and invokes the post-processing function.

processResponse function

The `processResponse` function receives the response from the carrier API and updates the shipment records with the following carrier-related details:

- Carrier link
- Carrier status
- Carrier status detail
- Carrier pick-up date
- Carrier delivered date
- Currency
- Delivery services cost
- Parcel weight

You can either use the default `processResponse` function or define a custom logic to update the shipment records.

Create a carrier integration profile

Create a carrier integration profile for your carrier by specifying the API and connection details that are used to connect your ServiceNow instance to the third-party shipping carrier application.

Before you begin

Role required: admin or asset_integration_admin

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Carrier integration profiles**.
3. Select **New**.
4. On the form, fill in the fields.

Carrier Integration Profile Details form

Field	Description
Name	Name of the integration profile.
Connection details	Reference to the Connection and Credentials Aliases table that stores the credentials of the customer. **Note:** Your credentials must be updated in the Connection and Credentials Aliases table so that you're authenticated to connect to the carrier API.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
API	Name of the script that has the integration business logic.
Job	Name of the scheduled job that invokes the carrier API to fetch the shipment details. This job is automatically created by a job that runs daily, The ITAM: Process integration profiles and stale shipment job.
Active	Option that indicates the status of the integration profile. **Note:** You can only deactivate the integration profile but can't delete the integration profile. When an integration profile is deactivated, the associated job that invokes the carrier API is deactivated automatically.

5. Select **Save**.

Result
The carrier integration profile is created and added to the Carrier integration profiles list.

Connect your ServiceNow instance with a shipping carrier application

Associate a shipping carrier with an integration profile to connect your ServiceNow instance to the carrier application.

Before you begin
Make sure that the shipping carrier that you want to associate with an integration profile has a shipping carrier record. For more details, see Create a shipping carrier record.

Role required: admin or domain_admin

About this task
A shipping carrier can be associated with only one active integration profile.

Procedure
1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Carrier integration profiles**.
3. Select the carrier integration profile that you want to associate with a shipping carrier.

   Note: The third-party carrier application automatically inserts records into the Carrier integration profiles list. If the integration profile associated with your carrier isn't listed, make sure that the prerequisites for the integration with the carrier are fulfilled. For more information, see Managing shipments by integrating with third-party carrier applications.

4. Select the **Shipping Carriers** tab.
5. Associate the shipping carrier with the carrier integration profile.

   a. Select **Add**.

   b. In the **Add carriers** dialog box, select the carrier and select **Add**.

      Note: If the carrier you intended to associate is not listed, it likely is already associated with an integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The shipping carrier is associated with the profile and the carrier details are shown in the **Shipping Carriers** tab.

Test the integration with the carrier API

Check the connection with the carrier API to handle any connection issues such as invalid credentials, incorrect tracking details, and issues with the integration script include.

Before you begin
Role required: admin or domain_admin

Procedure
1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Carrier integration profiles**.
3. Select the carrier integration profile that you want to test.
4. Select **Test connection**.

Result
A message that indicates the success or failure of the connection is displayed.

Create a shipping carrier record

Create a shipping carrier record used to associate the carrier with an integration profile.

Before you begin
Role required: inventory_admin

Procedure
1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Shipping carriers**.
3. Select **New**.
4. Provide the contact details of the carrier.
5. On the form, fill in the remaining fields.

Create New Shipping Carrier form

Field	Description
Name	Name of the shipping carrier. This field is required.
Company	Core company of the shipping carrier.
Integration profile	Profile for integrating with the third-party carrier's application. For more details, see View the carrier integration profile details.
Status	Status of the carrier. This field is set to **Active** by default.
Max wait days	Maximum days that the carrier takes to deliver a shipment. By default, this field is set to 90. You can change this value.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This field isn't shown on the form by default. You can choose to display this field on the form. A shipment record that is not updated by the carrier after the integration profile job has run for the specified maximum wait days is marked as stale shipment by The ITAM: Process integration profiles and stale shipment job.
Notes	Additional information about the carrier.

6. Select **Save**.

Result
The shipping carrier record is created and added to the Shipping carriers list.

Remove a shipping carrier from an integration profile

Remove a shipping carrier that you no longer want to associate with an integration profile.

Before you begin
Role required: admin or domain_admin

Procedure
1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Carrier integration profiles**.
3. Select the integration profile for which you want to remove the associated shipping carrier.
4. Select the **Shipping Carriers** tab and select the shipping carrier that you want to remove.
5. Select **Remove**.

Result
The shipping carrier is no longer associated with the integration profile.

Configure Zero Touch request flow

The Zero Touch request flow requires a Service Exchange connection, service catalog items, and an integration profile so that employees can submit hardware requests through an external provider.

The Zero Touch request flow requires setup on the provider ServiceNow instance and your ServiceNow instance so that requests are transmitted and fulfilled. The following configuration tasks are required.

Setup required for providers

The provider must complete the following tasks to fulfill the requests received through the Zero Touch request flow:

1. Complete the Service Exchange setup for providers.
2. Configure Scratchpad to send updates to your consumer.

Note: After completing the Zero Touch request flow prerequisites, the provider can fulfill provider tasks. For details, see Fulfill a provider task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Setup required for your Service Catalog requests

Complete the following tasks so that catalog requests can be fulfilled through an external provider:

1. Complete the Service Exchange setup for your service catalog requests.
2. Manage Service Catalog items for the Zero Touch request flow.
3. Create a provider integration profile.

> **Note:** You must perform this task only if the Scratchpad update received from your provider is not in the format required for the Zero Touch request flow. You must also create a Script Include to transform Scratchpad updates from your provider.

Configure Service Exchange for the Zero Touch request flow

The Zero Touch request flow uses the Service Exchange application to connect providers with your ServiceNow instance to manage hardware asset requests submitted through the Service Catalog.

Service Exchange setup for providers

Providers must perform the following tasks to communicate about the request details with your organization:

1. Install Service Exchange for Providers.
2. Register a Service Exchange consumer.
3. Create and publish remote record producers in a Remote Catalog.

Service Exchange setup for your service catalog requests

Perform the following steps to receive updates on the catalog requests from your provider:

1. Install Service Exchange for Consumers.
2. Activate the remote record producers published by the provider.

Use the Scratchpad to complete your request fulfillment tasks

As a provider, use the Scratchpad feature of the Service Exchange application to send updates to the ServiceNow instance of your consumer while performing the request fulfillment tasks.

The Zero Touch request flow requires you to send Scratchpad updates to your consumer's ServiceNow instance when you complete the confirmation and shipment tasks successfully. Based on the updates that you send, the Zero Touch flow progresses on your consumer's ServiceNow instance.

You must include the code specific to your tasks in the *PSBScratchpadUtil* API. For more information, see Using the Scratchpad for Service Exchange tasks. Confirm that the Scratchpad codes associated with the tasks of your request fulfillment flow are in the following format.

Sample code for request confirmation

```
var scratchPadJSON = {
  "orderStatus": "confirmed"
};
var value = JSON.stringify(scratchPadJSON);
var rtGR = new GlideRecord("sn_sb_pro_provider_task");
rtGR.get(<ProviderTaskID>);
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
if (rtGR.isValidRecord()) {
  var util = new sn_sb_pro.PSBScratchpadUtil();
  util.update(rtGR, "confirmation", value);
}
```

When you confirm a provider task, a Scratchpad update with the order status as **Confirmed** is sent to your consumer's ServiceNow instance.

Sample code for shipment

```
var scratchPadJSON = {
"orderStatus": "partially_shipped / fully_shipped"
"orderLineItems" :
  [{
    "status": "shipped",
    "trackingNumber": "123",
    "carrier": "C1",
    "modelNumber": 'MD322LL/A',
    "assetTag": 'P1000177',
    "serialNumber": 'P1000177'
  },{
    "status": "shipped",
    "trackingNumber": "123",
    "carrier": "C1",
    "modelNumber": 'MD322LL/A',
    "assetTag": 'P1000178',
    "serialNumber": 'P1000178'
  }
]
};
```

When you ship the requested items and confirm the shipment, a Scratchpad update with the following details are sent to your consumer's ServiceNow instance:

- **Order status**: Depending on how the provider has shipped the assets in a request, the Order status can have the following values:
  - **partially_shipped**: Assets in the request are shipped through multiple shipments.
  - **fully_shipped**: All the assets in the request are shipped.

  For example, consider that a requester has requested for five assets. If you ship only three assets though a shipment, you should pass the **Order status** as **partially_shipped**. When you ship the remaining two assets, you should pass the **Order status** as **fully_shipped**.
- **Tracking number**: Every shipment has a unique tracking number.
- **Carrier**: The name of the carrier through which the provider shipped the assets.
- **Model number**: Unique model number of the asset that is shipped.
- **Asset tag**: Unique asset tag of the asset that is shipped.
- **Serial number**: Serial number of the asset.

Note: The shipment update for consumable assets doesn't include Asset tag and Serial number details. If there are multiple shipments, the information of the asset in a shipment must be sent to your consumer's ServiceNow instance only once.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Manage Service Catalog items for the Zero Touch request flow

As a catalog administrator, configure your Service Catalog items so that the hardware asset requests can be fulfilled by an external provider.

Complete the following tasks for your catalog requests to be available for fulfillment through the Zero Touch request flow:

1. Associate your catalog items with the Zero Touch request flow.
2. Create variables for the catalog item associated with the Zero Touch request flow.
3. Associate a catalog item with a remote record producer.

Associate your catalog items with the Zero Touch request flow

Set the flow of your catalog item to Zero Touch request flow for fulfilling all the requests for that catalog item through an external provider.

Before you begin
Role required: catalog_admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.
2. Select the catalog item.
3. On the Catalog form, select **Zero touch request** in the **Flow** field.
4. Select **Update**.

What to do next
Create variables for the catalog item associated with the Zero Touch request flow.

Create variables for the catalog item associated with the Zero Touch request flow

Create variables for your catalog item so that your provider can fulfill the requests for that item based on the variable details.

Before you begin
Role required: catalog_admin

About this task
To enable your provider to fulfill the catalog requests accurately, you must create variables similar to the variables associated with your provider's remote record producer. For example, if the remote record producer has size and color variables, then you must create the same set of variables for the catalog item. For details, see View the variables of a remote record producer.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.
2. Select the catalog item.
3. On the catalog form, select the **Variables** tab.
4. Select **New**.
5. On the form, fill in the fields.
   For details on the form fields, see Service Catalog variable form fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: If your provider supports multiple quantities of an asset in a single request, hide the equivalent quantity variable for the catalog item by selecting the **Hidden** check box. This approach avoids multiple quantity fields on the catalog request.

6. Select **Submit**.

Result
The variables are displayed on the Service Catalog request for that catalog item.

What to do next
Associate a catalog item with a remote record producer.

Associate a catalog item with a remote record producer

Associate a service catalog item with your provider's remote record producer to send the order details to your provider for fulfillment.

Before you begin
Role required: catalog_admin

Procedure
1. Navigate to **All** > **Asset** > **HAM Zero Touch** > **Catalog Item mappings**.
2. On the form, fill in the fields.

Catalog item mapping form

Field	Description
Catalog item	Service Catalog item that you want to associate with the remote record producer.
Remote record producer	Remote record producer of the external provider.
Multiple quantity supported	Option to indicate that your provider's remote record producer supports multiple quantities for the catalog item.
Quantity variable	Variable to capture quantity from the list of variables defined for the catalog item. This field is editable only when the **Multiple quantity supported** check box is selected.
Active	Option to indicate that the catalog item mapping is available for use.

3. Select **Submit**.

View the variables of a remote record producer

View the variables associated with your provider's remote record producer. Variables help you identify the necessary details to include in catalog requests for fulfillment by your provider.

Before you begin
Role required: catalog_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Service Bridge Consumer** > **Provider connections**.
2. Select your provider connection.
3. Select the **Remote record producers** tab.
4. Select the remote record producer.
5. Select the **Variables** tab.

Result

The variables of the selected remote record producer are listed in the Variables tab.

Create a provider integration profile

Create a provider integration profile to convert any format of Scratchpad update sent by your provider to a format required for the Zero Touch request flow.

Before you begin

You must have the Script Include with the method *`transformScratchPadToHAMZTRFormat`*. For details, see Create a Script Include to transform Scratchpad updates from the provider.

Role required: asset_integration_admin or admin

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Zero touch** list, select **Provider integration profiles**.
3. Select **New**.
4. On the form, fill in the fields.

Create New Provider Integration Profile form

Field	Description
Provider	Name of the external provider.
API	Name of the Script Include that includes the business logic for transforming the Scratchpad update sent by the provider to the required format.
Active	Option for indicating the status of the provider integration profile.

5. Select **Save**.

Result

The provider integration profile is created and added to the Provider integration profiles list.

Create a Script Include to transform Scratchpad updates from the provider

To transform Scratchpad updates sent by your provider into a format required for the Zero Touch request flow, you must have a Script Include with the method *`transformScratchPadToHAMZTRFormat`*.

In the confirmation and shipment stages of the Zero Touch request flow, your provider should ideally send Scratchpad updates to your ServiceNow instance in a particular format. For details, see Use the Scratchpad to complete your request fulfillment tasks. However, if your provider's

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scratchpad update isn't in the required format, you can transform it by using a Script Include with the method *transformScratchPadToHAMZTRFormat*.

Consider the following points when you create the Script Include:

- The Script Include is accessible from the Asset Management Common application scope by adjusting the following settings on the application resource record:
  - Set the **Accessible from** field to **All application scopes**.
  - Set the **Caller Access** field to **None** to make sure the caller access isn't restricted.
- Define the method *transformScratchPadToHAMZTRFormat* in the following format:

```
/*** Input to the following method is scratchpad value of type
 JSON ***/
transformScratchPadToHAMZTRFormat: function (input) {
// Logic to transform the input to the expected format
// This method should return a value of type JSON with expected
 format
}
```

Configure Zero Touch Refresh flow

Set up the Service Exchange connection and replacement models that the Zero Touch Refresh flow requires before asset managers can initiate hardware refresh requests through an external provider.

Configuration details

Configuration task	Configuration scope
Service Exchange configuration for Zero Touch Refresh	Service Exchange connection between your ServiceNow instance and the provider ServiceNow instance, including triggering remote task assignment and activating remote task definitions.
Replacement model configuration for a refresh model	Replacement models for each refresh hardware asset model so that employees can select correct replacement asset when a refresh request is initiated.

Service Exchange configuration for Zero Touch Refresh

The Zero Touch Refresh flow uses the Service Exchange application to connect providers with your ServiceNow instance to manage asset refresh requests. Your employees and the provider can work on requests in their own environments.

Service Exchange setup for providers

Providers should perform the following setup tasks to communicate the details of Zero Touch Refresh requests:

1. Install Service Exchange for Providers.

   Note: To migrate from the legacy Service Exchange application, see Migrate from Service Exchange (legacy).

2. Onboard a new Service Exchange customer.
3. Trigger the assignment of a remote task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Service Exchange setup for employee requests

Perform the following setup to communicate the details of Zero Touch Refresh requests with the provider:

1. Install Service Exchange for Consumers.
2. Activate the remote task definitions published by the provider.

Trigger the assignment of a remote task

As an asset provider, create remote task definitions that trigger the assignment of a remote task for your customer to communicate the details of Zero Touch Refresh requests.

Before you begin

As a provider, you must have created a provider record. For more details, see Set up a Service Exchange provider record.

Role required: admin

About this task

You receive the details of a Zero Touch Refresh Fulfillment Request from your customer's ServiceNow instance through the inbound fields of the remote task definition. Any updates made to the Zero Touch Refresh Fulfillment Request are sent to your customer's ServiceNow instance through the outbound fields of the remote task definition.

Procedure

1. Navigate to **All** > **Service Bridge** > **Provider** > **Remote Task Definitions**.
2. Select **New**.
3. On the form, fill in the fields.

   For the description of field values, see Remote task definition form.
4. Set the **Provider table** and **Customer table** field values to the Zero Touch Refresh Fulfillment Request [sn_itam_ztr_fulfillment_req] table.
5. Select **Submit**.
6. Select this new remote task definition record.
7. Create the inbound fields, which enable you to receive data from the customer's instance when a remote task is created or updated.

   a. On the **Inbound fields** tab, select **New**.

   b. For each field you create, fill in the fields and then select **Submit**.
   For the required details of the inbound fields that you must create, see Remote task definition inbound and outbound fields.
8. Create the outbound fields, which enable you to send data to the customer's instance when a remote task is created or updated.

   a. On the **Outbound fields** tab, select **New**.

   b. For each field you create, fill in the fields and then select **Submit**.
   For the required details of the outbound fields that you must create, see Remote task definition inbound and outbound fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. Set customer criteria, which specify the customers who can use this remote task definition.
10. Select **Publish**.

> **Note:** If you later need to edit this remote task definition, access it and select **Edit**.

Result

A remote task definition record is created on your instance and the **State** field of the record is set to Published. This record is also synchronized with your customer's instance and is pending activation on your customer's instance.

Activate the remote task definitions

Activate the remote task definitions published by the provider on your instance so that your provider can fulfill your Zero Touch Refresh requests.

Before you begin

The Service Exchange application must be installed on your instance. For more information, see Install Service Bridge for customers.

Before you can activate a remote task definition on your ServiceNow instance, your provider must create and publish it. For more information, see Trigger the assignment of a remote task.

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge** > **Customer** > **Remote Task Definitions**.
2. Select the remote task definition record.
3. On the Remote Task Definition form, in the Simple Trigger section, set the trigger condition as **Model is not empty**.
   Remote tasks are automatically created when records with values in the **Model** field are added to the Zero Touch Refresh Fulfillment Request [sn_itam_ztr_fulfillment_req] table.
4. Select **Save**.
5. Verify the data on the **Inbound fields** tab, the **Outbound fields** tab, and the **Remote task variables** tab.
   The provider defines these values. When you create a remote task, the provider receives the remote task data through the inbound fields and responds with the remote task data through the outbound fields.
6. Select **Activate**.
7. In the pop-up window, verify the mappings of the inbound and outbound variables and select **OK**.

Configure replacement models for a refresh model

Configure replacement models for a hardware asset model that is refreshed. When configured, employees can select replacement models for their hardware assets on the Zero Touch Refresh form.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. In the **Zero touch refresh** list, select **Refresh models**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Create the refresh model.

   a. On the Refresh models page, select **New**.

   b. On the form, fill in the fields.

Create New Zero Touch Refresh Model form

Field	Description
Model	Model that is being refreshed.
Location	Location for which the replacement models are valid. **Note:** Configuring replacement models for a country is the most efficient setup. However, you can configure replacement models for more specific locations such as state or city.
Active	Option that indicates whether the replacement rule is active.

   c. Select **Save**.

4. Add replacement models for the refresh model.
   a. In the **Replacement models** tab, select **Add**.
   b. In the **Replacement Model** dialog box, select the models that you want to add as replacement for the refresh asset model and select **Add**.
   c. Select **Save**.

Result
The refresh model with the assigned replacement models is included in the **Refresh models** list.

Connect to the Lenovo Warranty API

Create a connection and credential to connect to the Lenovo Warranty API and download the warranty information for hardware assets.

Before you begin
You should have the Client ID provided by Lenovo. If you don't have one, contact your organization's Lenovo sales or service representative.

Role required: admin

Procedure
1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
2. Select *Lenovo*.
3. From the **Related Links**, select **Create New Connection and Credential**.
4. **Optional:** Change the default connection name for the connection to the Lenovo Warranty API
   In the **Connection Name** field.
   By default, this field is set to **Lenovo Connection**.

Important: Don't change the default URL specified in the Connection URL field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. In the **Client ID** field, enter the Client ID provided by Lenovo.
6. Select **Create**.

Result
The Lenovo connection is successfully created and listed in the Connections tab.

What to do next
After you save the connection and credential records, the Lenovo Warranty API is ready to use. For information about the process for downloading warranty information for hardware assets, see Integration with Lenovo for asset warranty details.

Tip: No connection test is available for the Lenovo Warranty API. To confirm that the connection is working, check the **Asset Job Log** [asset_job_log] table after the warranty download job runs. If the credentials are incorrect or the connection fails, the job runs but doesn't download warranty information, and logs the details for each run.

Add a charity organization for donating assets

Add a charity organization to the Charity Organization [sn_itam_common_charity_org] table to make it available for asset donations.

Before you begin
Role required: asset

Procedure
1. Navigate to **All** > **Inventory** > **Charity Organization**.
2. Select **New**.
3. Provide the location and contact details of the charity organization.
   The **Name** and **Zip/Postal code** fields are required.
4. On the form, fill in the remaining fields.

Charity Organization New Record form

Field	Description
ID	Unique identifier that you assign to the charity organization. The ID field is required.
Active	Option to mark the charity organization record as active.
Domain	Domain of the charity organization record. The charity organization record is set to the global domain automatically when no default domain is available.

5. Select **Submit**.

Result
The charity organization record that you added is added to the Charity Organizations list.

Configure the Manage contract repository agentic workflow for HAM

Install the ServiceNow Otto for Contract Management Pro plugin (sn_cm_gen_ai) and activate the generative AI skills to use the Manage contract repository agentic workflow.

Before you begin
Role required: sn_cm_gen_ai.ai_contract_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Install the ServiceNow Otto for Contract Management Pro plugin (sn_cm_gen_ai).
   For information about the plugin installation process, see Install plugins for ServiceNow Otto.
2. Navigate to **All** > **AI Admin Hub** > **Skills**.
3. Access the **AI Skills** tab of the AI Admin Hub console.
4. Navigate to **Employee** > **CM Pro**.
5. Select the **Activate skill** tab on the skill that you want to activate.
6. In the skill guided setup, configure the use cases and other mappings for the Contract obligation extraction and Contract metadata extraction skills.
   - For more information on configuring the Contract metadata extraction skill, see Configuring contract metadata extraction. Complete the creation of use case, mapping use case, and enable notifications setup.
   - For more information on configuring the Contract obligation extraction skill, see Configuring contract obligation extraction.

   Important: When adding a new use case mapping record for these skills, clear the **Contracts created from contract request** check box.
7. In the Define access page, select **Save and continue**.
8. In the Review and activate page, select **Activate**.

Result
When a warranty, maintenance, lease, or purchase contract record is created, the **Initiate contract extraction** button is displayed on the contract form.

Related topics

Hardware Asset Management integration with Contract Management Pro

Manage contract repository agentic workflow in the Hardware Asset Workspace

Configuring ServiceNow Otto for Hardware Asset Management (HAM)

Configure the ServiceNow Otto for Hardware Asset Management (HAM) application to use the agentic workflow capabilities for managing your hardware asset requests autonomously.

Install ServiceNow Otto for Hardware Asset Management (HAM)

If you have the admin role, you can install the ServiceNow Otto for Hardware Asset Management (HAM) application. ServiceNow Otto for HAM enables asset managers and procurement users to use the capabilities of agentic workflows in Hardware Asset Management.

Before you begin
Role required: admin

Procedure

1. Go to the ServiceNow Store.
2. In the search bar, enter ServiceNow Otto for Hardware Asset Management (HAM) and then select **Search**.
3. Select the ServiceNow Otto for Hardware Asset Management (HAM) widget and then select **Get** to make this application available for installation on your ServiceNow instance.
4. On your ServiceNow instance, navigate to **All** > **System Definitions** > **Plugins**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Search for the ServiceNow Otto for Hardware Asset Management (HAM) application.
6. Select **Install**.

Result

The agentic workflow and the AI agents included in the ServiceNow Otto for Hardware Asset Management (HAM) application are installed on your ServiceNow instance.

What to do next

1. Enable the Now Assist panel to access the AI agents. For details, see Activate the ServiceNow Otto panel standard chat.
2. Activate the AI Search application on your ServiceNow instance enabling the AI agents to search and get related records.
   a. Navigate to **All** > **AI Search** > **AI Search Status**.
   b. Trigger the automatic AI Search activation process on your ServiceNow instance by selecting **Request AI Search**.

   Note: The activation process can take up to 24 hours.

Applying the CSDM guidelines to Hardware Asset Management

Hardware Asset Management manages (contributes data to) CSDM tables. Hardware Asset Management also uses data from CSDM tables that other applications generate. Several ServiceNow products, therefore, benefit from and add value to Hardware Asset Management.

Implementing the CSDM data framework

The CSDM is the data framework that you follow when you set up ServiceNow products and applications. You adhere to the CSDM guidelines when you define the configuration items (CIs) and the relationships between CIs in the CMDB. This process makes sure that your data resides in the appropriate CMDB tables so that you get the maximum value from your ServiceNow AI Platform applications.

Using a CSDM standard and consistent set of terms and definitions helps to track the assets effectively through their life cycle transitions.

Note: To set up CSDM for Hardware Asset Management, see Implementing the CSDM framework in stages.

Tables adhering to the CSDM guidelines managed by Hardware Asset Management

1. Product Model table [cmdb_model]: The Asset Management application manages and contributes data to this table.
2. Asset table [alm_asset]: The Asset Management application manages this table containing asset details.

CSDM table used by Hardware Asset Management

Configuration Item table [cmdb_ci]: CMDB manages this table. The Hardware Asset Management application references configuration item (CI) data from this table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

CSDM life cycle mappings for Hardware Asset Management

The base system contains the Life cycle mapping [life_cycle_mapping] table that stores the life cycle mapping values. A mapping record specifies how to map legacy life cycle field values of a class such as asset or product model, to the CSDM **Life cycle stage** and **Life cycle stage status** fields. You can get the mapping details of the Asset [alm_asset] and the Product Model [cmdb_model] tables in the Life cycle mapping table.

Product Model table [cmdb_model] mapping of Hardware Asset Management and CSDM

Product Model Status field	CSDM Life cycle stage and Life cycle stage status fields
Retired	End of Life | Retired
Build	Design | Build
Sold	End of Life | Sold
In Production	Operational | In Use

Asset table [alm_asset] mapping of Hardware Asset Management and CSDM

Asset State and Substate fields	CSDM Life cycle stage and Life cycle stage status fields
Retired | RMA	End of Life | RMA
Retired	End of Life | Retired
Retired | Vendor Credit	End of Life | Vendor Credit
In stock | Reserved	Inventory | Reserved
In stock | Legal hold	Inventory | Legal Hold
In stock | Pending transfer	Deploy | Pending Transfer
Missing | Lost	Missing | Lost
In stock | Pending resale	End of Operation | Pending Resale
Retired | Pending resale	End of Operation | Pending Resale
Retired | Lease return	End of Life | Lease Return
Missing | Stolen	Missing | Stolen
Retired | Donated	End of Life | Donated
In transit | Available	Deploy | In Transit
In transit | Pending donation	End of Operation | In Transit
In transit	Deploy | In transit
In transit | Pre-allocated	Purchase | Pre Allocated
Build	Design | Build
In use	Operational | In Use
In transit | Pending resale	End of Operation | In Transit
Retired | Sold	End of life | Sold
Retired | Buy out	End of Life | Buy Out

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset table [alm_asset] mapping of Hardware Asset Management and CSDM (continued)

Asset State and Substate fields	CSDM Life cycle stage and Life cycle stage status fields
In transit | Defective	Defective | In transit
In stock	Inventory | Available
Retired | Disposed	End of Life | Disposed
In stock | Pending install	Deploy | In Stock
In stock | Pending evaluation	End of Operation | Pending evaluation
In stock | On hold	End of Operation | On Hold
In stock | Pending disposal	End of Operation | Pending Disposal
On order	Purchase | On Order
In use | Pending fulfillment	Operational | Pending Fulfillment
Retired | Obsolete	End of Life | Obsolete
In stock | Test	Deploy | Test
In maintenance	Operational | In Maintenance
Retired | Pending disposal	End of Operation | Pending Disposal
In use | End of support	Operational | End of Support
In stock | Pending repair	Inventory | Pending Repair
In stock | Defective	Defective | In Stock
In stock | Available	Inventory | Available
In transit | Pending disposal	End of Operation | In Transit
In transit | Pending install	Deploy | In Transit
In stock | Pre-allocated	Inventory | Pre Allocated
In transit | Reserved	Deploy | Reserved
In stock | Pending return	End of Operation | Pending Return
In use | Pending retirement	Operational | Pending Retirement
In stock | Quarantine	Inventory | Quarantine
Missing	Missing | Lost
In stock | Pending certificate	End of Operation | Pending Certificate
In stock | Pending donation	End of Operation | Pending Donation

CSDM life-cycle fields on the forms

The synchronization between the legacy fields and the CSDM life-cycle fields is bi-directional for both product model and asset. However, note the following points about the availability of the CSDM fields on the forms:

- On the Model form, both **Life cycle stage** and **Life cycle stage status** fields are shown.
- On the Asset form, the CSDM life-cycle fields aren't shown.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Synchronization of CSDM life-cycle fields between asset and CI

If you have opted-in to CSDM in the releases before Xanadu, synchronization of the CSDM life-cycle fields between the asset and CI happens through the legacy fields. However, when you upgrade to Xanadu, you can also opt in to directly synchronize the CSDM life-cycle fields between the asset and CI.

From the Xanadu release onward, when you opt in to CSDM, the life-cycle fields are directly synchronized between the asset and CI.

For more details on synchronization of life-cycle fields, see Synchronizing life-cycle values for Asset, CI, and IBI.

Using Hardware Asset Management

Use the Hardware Asset Management application to manage your hardware and consumable assets.

Procurement and fulfillment

Manage the end-to-end procurement and fulfillment of hardware assets, from processing incoming shipments and creating stock orders to handling returns, loaner assets, and AI-assisted request management.

Tasks

Perform these tasks as needed to manage hardware asset procurement and fulfillment operations in HAM.

Procurement and fulfillment tasks

Task	Description
Fulfill hardware asset requests	Manage hardware asset requests through the standard request flow, either manually or using an agentic workflow.
Fulfill hardware asset requests using the Zero Touch request flow	Fulfill standard hardware assets through an external provider using the Zero Touch request flow.
Use Advanced Shipment Notification	Receive and reconcile incoming hardware assets against purchase orders before they arrive in your stockroom.
Create an inventory stock order request	Create stock orders to replenish hardware asset inventory in your stockrooms based on demand or stock rule thresholds.
Manage RMA requests	Initiate and track return merchandise authorization requests for defective or incorrect assets returned to vendors.
Manage loaner assets	Issue and track loaner hardware assets to employees while their primary assets are being repaired or replaced.
Track shipments using the integration framework	Monitor shipment status updates from your third-party carrier application.

Fulfilling hardware asset requests

You can fulfill hardware asset requests submitted through the Service Catalog application manually or by using the Help manage hardware asset requests agentic workflow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ServiceNow Otto for Hardware Asset Management (HAM) AI agent collection Help manage hardware asset requests agentic workflow

Use the Help manage hardware asset requests agentic workflow, driven by AI agents, to handle your employees' hardware asset requests automatically. The AI agents fulfill requests by either consuming the available local stock, or by generating transfer orders or purchase orders.

https://player.vimeo.com/video/1096608088?h=2b114916d2&badge=0&autopause=0&player_id=0&app_id=58479

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

Help manage hardware asset requests agentic workflow overview

The AI agents in the Help manage hardware asset requests agentic workflow help to speed up request resolution, improve operational efficiency, and enhance user satisfaction. This agentic workflow processes and fulfills requests for hardware, consumables, bundles, and pallets.

Note: The itil, the procurement_user, and the now_assist_panel_user roles have access to the ServiceNow Otto panel. The fulfiller needs the itil and procurement_user roles if you have the ServiceNow Otto for IT Service Management (ITSM) store application installed. If you have the ServiceNow Otto for Hardware Asset Management (HAM) store application but not the ServiceNow Otto for IT Service Management (ITSM) store application, then the fulfiller requires the itil, procurement_user, and now_assist_panel_user roles to fulfill the request via the panel trigger.

.

Auto-sourcing scenarios

To enable AI agents to perform sourcing autonomously, the following options are available at the stockroom level:

- **Auto-consume**: Automatically use the available local stock.

  Automatic consumption of local stock happens when a minimum of one stockroom serving the location of the requester has the **Auto-consume** option enabled. If several stockrooms at the location of the requester have the **Auto-consume** option enabled, assets are first consumed from the stockroom with the highest available quantity. If there are still assets needed, they’re consumed from the stockroom with the next highest quantity.

- **Auto-transfer**: Automatically transfer stock from another stockroom.

  Automatic transfer of assets happens under the following conditions:

  - There’s only one destination stockroom serving the location of the requester that has the **Auto-transfer** option enabled.
  - The destination stockroom must be linked to distribution channels that serve as source stockrooms. Sourcing from these channels is based on their rank, beginning with the distribution channel having the lowest rank and moving on to the next ranks.
  - The **Auto-transfer** option is enabled on both the source and destination stockrooms.

  .

- **Auto-purchase**: Automatically create purchase orders to procure assets from a vendor.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Automatic purchase of assets happens under the following conditions:

- There's only one stockroom serving the location of the requester that has the **Auto-purchase** option enabled.
- There's only one vendor from whom the model of the requested item can be purchased.

Requested item (RITM) validations

Before sourcing any hardware asset requests, the Help manage hardware asset requests agentic workflow validates the requested item (RITM). The agentic workflow doesn't proceed with sourcing under the following conditions:

- The RITM number is missing or invalid.
- More than one requested items have the same RITM number.
- The requested item is already sourced.
- The request isn't sourceable.
- The request isn't approved.
- The model that's requested is invalid or missing.
- The model isn't associated with any model category.
- The resource category of the requested model isn't opted in.
- The model associated with the catalog item isn't licensed.

Prerequisites for using the Hardware Asset Management sourcing AI agent

- The catalog item must be configured to trigger the Standard Hardware Asset Request flow. The sourcing agent depends on actions within this flow, such as request approval.
- The requesting user's profile or the requested item must have a location populated. The sourcing agent first checks the requested item for a location; if none is found, it falls back to the requesting user's profile location.
- The stockroom must have the Auto-consume, Auto-transfer, or Auto-purchase options enabled for autonomous sourcing. If these flags aren't set, the agent presents a sourcing plan for user confirmation rather than processing the request automatically.
- The stockroom must service the requesting user's location. The agent uses location hierarchy and stockroom-to-location mappings to find a match. The stockroom does not need to share the exact same location as the user, but must service that location or one of its parent locations.

Troubleshoot sourcing agent errors

If the sourcing agent can't fulfill a request, use the following table to identify the root cause and resolution.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details of troubleshooting scenarios

Agent error message	Possible root cause	Resolution
No stockroom is set up for automatic sourcing	• Auto-consume, Auto-transfer, or Auto-purchase is not enabled on the stockroom • The requesting user's profile and the requested item both have no location populated • The catalog item is not configured to trigger the Standard Hardware Asset Request flow • No stockroom services the requesting user's location	• Enable the relevant auto-sourcing option on the stockroom • Populate the location field on the requested item or the requesting user's profile • Update the catalog item configuration to trigger the Standard Hardware Asset Request flow • Configure a stockroom that services the user's location or one of its parent locations
The stockroom configured for automatic sourcing is out of stock	No available assets in the matched stockroom	Replenish stock or configure an alternate stockroom
No vendor catalog items available	No vendor catalog item is linked to the product model	Link a vendor catalog item to the product model

Stages in the agentic workflow

The fulfillment of hardware asset requests through the agentic workflow includes the following stages:

1. Hardware asset request initiation
   a. An employee creates a hardware asset request in the Service Catalog application.
   b. The request is either automatically approved or, when necessary, approved by the asset manager.
   c. The requested item is assigned to a procurement user, which triggers the Help manage hardware asset requests agentic workflow.
2. Asset availability checks by the AI agent
   a. The AI agent verifies whether the requested item is available in the inventory.
   b. The AI agent also checks the stockrooms that are set up for automatic consumption of local stock, transfer, and purchase.
3. Asset sourcing and allocation

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. When stockrooms are configured to consume, transfer, and purchase assets automatically through the AI agents, the following events occur:

   i. The AI agent first uses the available stock in the stockroom.

   ii. For any remaining assets that can be transferred from another stockroom, the AI agent creates a transfer order.

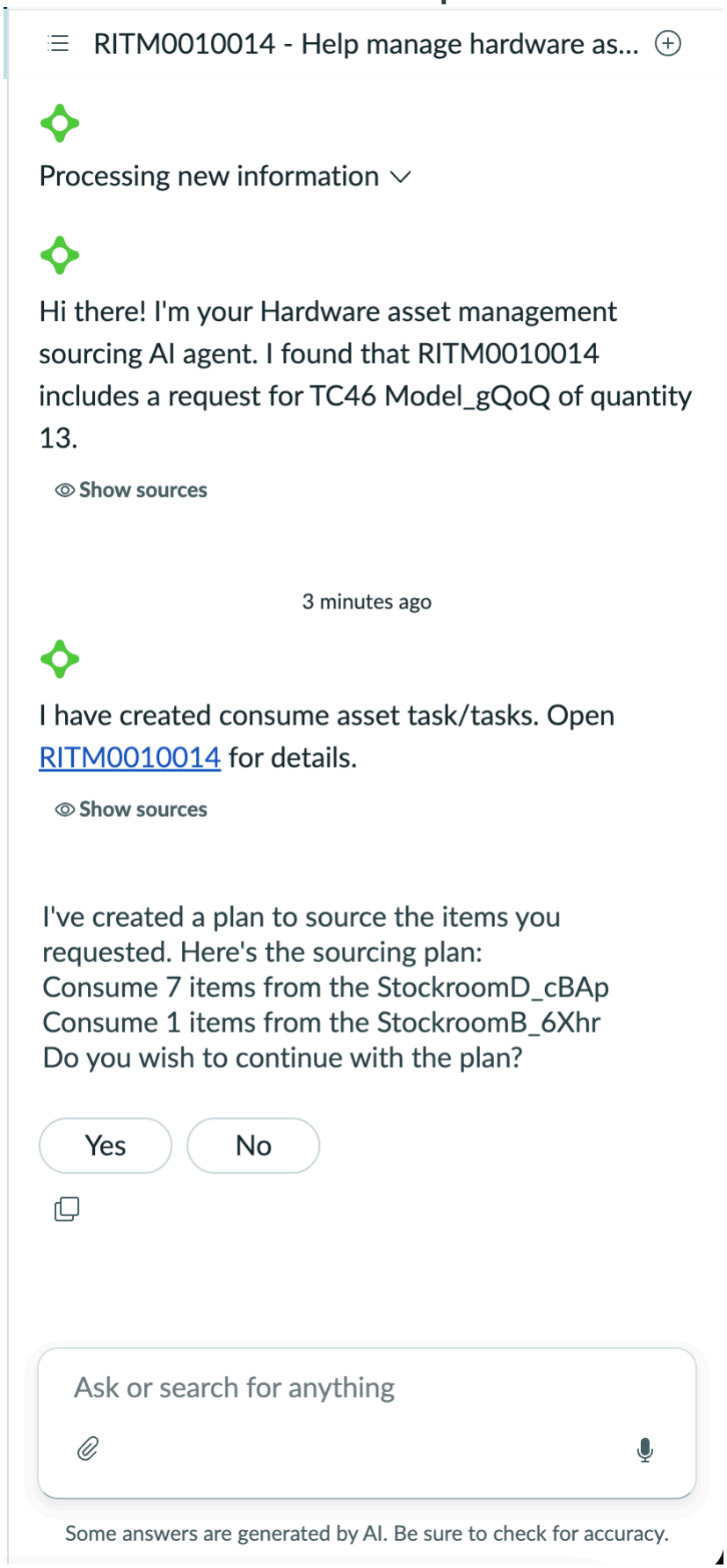
   iii. If there are still assets to be sourced, the AI agent creates a purchase order to buy them from a vendor.

b. When assets are available in stockrooms that aren't set up for automatic sourcing, the AI agent creates a sourcing plan and asks for confirmation from the assignee of the requested item (RITM) or the person who started the conversation through the ServiceNow Otto panel before proceeding.

   Note: To access the panel after it has been activated, you should have the now_assist_panel_user role. To access the Help manage hardware asset requests agentic workflow in the Hardware Asset Workspace, select the Otto icon .

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Conversations in the ServiceNow Otto panel



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

i. If the AI agent receives the confirmation to proceed and there have been no changes to the plan, it sources the assets according to the sourcing plan.

> **Note:** If there's a change in the plan, the agentic workflow stops, and the conversation should be reinitiated through the panel.

ii. If the AI agent receives a confirmation not to proceed with the sourcing plan, or if there's still some quantity of assets remaining to be sourced, the agentic workflow continues as follows:

1. The AI agent first verifies whether the assets can be sourced through a transfer order or purchase order.

   If the transfer is possible, the following events happen:

   a. The AI agent asks to confirm whether it can proceed with the transfer.

   b. If the AI agent receives confirmation to proceed, it asks to confirm both the source and destination stockrooms.

   c. After receiving confirmation, the AI agent creates a transfer order.

   > **Note:** If there's only one stockroom available as the source or destination, it's automatically selected. The AI agent displays only the source stockrooms that have the quantity of assets to be sourced. Only the stockrooms that serve the location of the requester are shown as destination stockrooms.

2. If the AI agent receives a confirmation not to proceed with the transfer order:

   a. The AI agent further requests confirmation to proceed with the purchase order.

   b. If the AI agent receives confirmation to proceed, it asks to confirm the vendor and the destination stockroom.

   c. After receiving confirmation, the AI agent creates a purchase order.

   > **Note:** If there's only one stockroom or vendor available, these values are automatically selected. The AI agent displays the list of vendors for the requested item. Only the stockrooms that serve the location of the requester are shown as destination stockrooms.

3. If the user doesn't agree to either the transfer order or the purchase order, the request must be sourced manually.

Refer to the information provided here on the AI agents related to the Help manage hardware asset requests agentic workflow.

To modify the Help manage hardware asset request agentic workflow duplicate it, and adjust the settings according to your requirements.

> **Important:** In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AI agents used in the Help manage hardware asset requests agentic workflow

The Help manage hardware asset requests agentic workflow uses specific AI agents to consume local stock, transfer assets between stockrooms, and procure assets from vendors.

Role of AI agents the Help manage hardware asset requests agentic workflow

AI agent	AI agent role
Hardware asset management sourcing AI agent	• The AI agent checks if the requested item is available in the stockroom. Depending on the automatic sourcing set up in the stockroom, the AI agent either uses the local stock autonomously or creates a sourcing plan and requests user confirmation to consume the assets. • Triggers the Transfer order creation AI agent to create transfer orders. • Triggers the Purchase order creation AI agent to create purchase orders.
Transfer order creation AI agent	Sources the requested item by either creating a transfer order autonomously or according to the sourcing plan created by the Hardware asset management sourcing AI agent. If there are multiple source or destination stockrooms, the AI agent requests user input to create the transfer order.
Purchase order creation AI agent	Sources the requested item by either creating a purchase order autonomously or according to the sourcing plan created by the Hardware asset management sourcing AI agent. If there are multiple destination stockrooms or vendors, the AI agent requests user input to create the purchase order.

Access the Help manage hardware asset requests agentic workflow in the AI Agent Studio

- Navigate to **All** > **AI Agent Studio** > **Create and manage**.
- Select **Help manage hardware asset requests**.

Fulfill hardware asset requests manually by using the Standard Hardware Asset Request flow

Use a hardware asset request flow for requesting, sourcing, and deploying hardware catalog items from the Service Catalog application.

Before you begin

Role required:

- catalog_admin
- procurement_admin

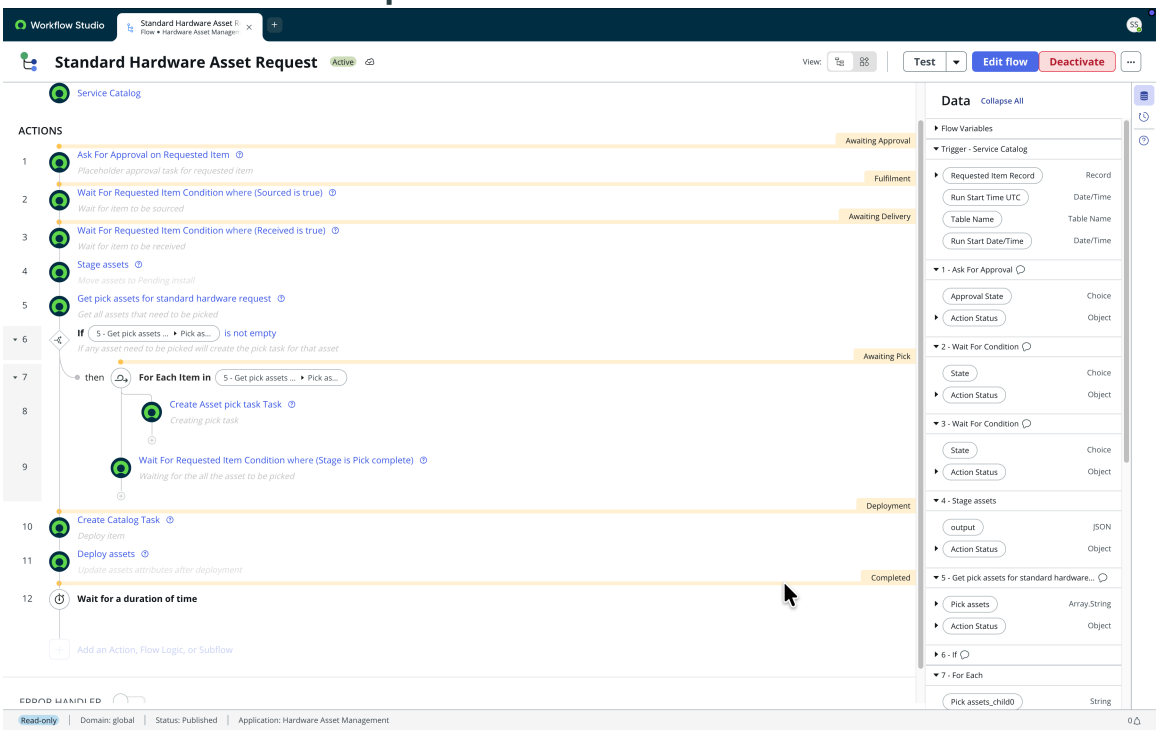
About this task

Create a request for a hardware catalog item from the Service Catalog application. Associate the catalog item with the Standard Hardware Asset Request flow to trigger the flow.

The Workflow Studio application is used to create the Standard Hardware Asset Request flow to take you through the process of sourcing, procuring, and deploying your hardware catalog items. As the flow takes you through the various stages, the asset details are automatically updated. You can open the Standard Hardware Asset Request flow to view the status of the stages in the flow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Standard Hardware Asset Request flow



Procedure

1. Log in with credentials for the role of catalog_admin and navigate to **Service Catalog** > **Maintain Items**.
2. Open the hardware catalog item and in the **Flow** field, select **Standard Hardware Asset Request**.
   If the **Flow** field isn't visible, add it to the form layout by right-clicking the menu icon and navigating to **Configure** > **Form layout**.
3. Select **Save**.
   The Standard Hardware Asset Request flow is now associated with the hardware catalog item.
4. Navigate to **Service Catalog** and select **Hardware**.
5. Select your catalog item from the list.
6. In the **Location** field, specify the location where the assets should be deployed.
   By default, this field is set to the location of the logged-in user. However, you can select a location from the list of available locations.

   Note: This field is available only for Hardware catalog items that are published from Hardware models after upgrading to Hardware Asset Management 8.0.0.

7. In the **Quantity** field, specify the quantity of the assets and select **Order Now**.
8. Log in with credentials for the role of procurement_admin and open the new request.
9. In the Requested Items related list, select the request item.
10. In the Requested Item form layout, select the **Flow Context** related link to view the current stage of the Standard Hardware Asset Request flow.
11. Select the **Catalog Tasks** related list to view the sourcing task for the request.
12. Open the catalog task and select **Source Request**.
13. In the Source Request form layout, select **Add Transfer Order** or **Add Purchase Order** to source the request via a transfer order or a purchase order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After you procure the catalog item, the Asset pick task is created for the Requested item only if the asset is sourced from the stockroom which has the Asset Pick task enabled. Otherwise the Deployment task is created for the Requested item without the Asset pick task. For details, see Enable the Asset pick task for your stockroom in the Hardware Asset Workspace.

14. Select the Requested items related list and select the requested item.
15. Select the **Catalog Tasks** related list.
    - If the Pick task is enabled for the source stockroom, complete the Asset pick task first and then complete the Deploy task.
    - If the Pick task isn't enabled, complete the Deploy task.
16. Complete the Asset pick task using the Mobile Agent application.
    For details on completing this step, see Manage hardware asset pick tasks using the Mobile Agent application.
    The Deployment task is created for the requested item.
17. Close the Deployment task.
    In the Standard Hardware Asset Request flow, the action that is associated with deploying the assets is complete. The **State**, **Assigned**, **Installed**, **Location**, and **Assigned to** fields of asset are updated. The CI that is associated with the asset is also updated.

Use Zero Touch request flow

Fulfill hardware asset requests of your employees through an external provider by using the Zero Touch request flow.

After Configure Zero Touch request flow is complete, employees can submit hardware asset requests through the service catalog, and the provider receives and fulfills those requests automatically through the Zero Touch request flow.

Zero Touch request flow tasks for your employees

1. Request a hardware asset through the Zero Touch request flow.
2. Acknowledge receipt of an asset received through the Zero Touch request flow.

Zero Touch request flow task for providers

Fulfill incoming hardware asset requests assigned to you through the Zero Touch request flow.

Fulfill a provider task

As a provider, ship the asset requested through the Zero touch request flow to the requester.

Before you begin

1. The Service Exchange configuration necessary for the Zero Touch Refresh flow must have been set up. For more details, see Configure Service Exchange for the Zero Touch request flow.
2. The Scratchpad must have been configured for the confirmation and shipment tasks involved in your request fulfillment flow. For more information, see Use the Scratchpad to complete your request fulfillment tasks.

Role required: Roles are provider-specific

About this task

When an employee places an order for the catalog item associated with the Zero Touch request flow on your consumer's ServiceNow® instance, a corresponding Provider task is created on your ServiceNow® instance. The provider task triggers a request fulfillment flow on your

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ServiceNow® instance. As the provider task moves through various stages in the fulfillment flow, the information is sent to your consumer's instance through the Scratchpad updates.

Procedure

1. Log in to your ServiceNow® instance.
2. Navigate to **All** > **Service Bridge Provider** > **Open Records** > **Provider Tasks**.
3. Select a provider task that is in the Received state.
4. Review the details on the Provider task form.
   The Variables section provides details that the requester provided on the Service Catalog request.
5. Confirm the provider task by sending a Scratchpad update to your consumer's ServiceNow® instance.
6. Ship the assets requested in the provider task and send a Scratchpad update with the shipment details to your consumer's ServiceNow® instance.
   The following shipment details are included in the Scratchpad:
   - Order status: Order status could be either **fully_shipped** or **partially_shipped**.
   - Tracking number: Unique tracking number for the shipment.
   - Model number: Unique model number of the asset that is shipped.
   - Asset tag: Unique asset tag of the asset that is shipped.
   - Serial number: Serial number of the asset.

Result

An asset with the serial number and asset tag specified in the Scratchpad is assigned to the requester.

View hardware asset requests submitted through the Zero Touch request flow

View the list of hardware asset requests of your employees submitted through the Zero Touch request flow in the Asset operations view.

Before you begin

Role required: admin or asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Zero touch** list, select **Asset requests**.
   The list of asset requests is displayed. You can get the request details such as requested item, quantity, and stage.
3. Select an asset request to view the details.

Use Advanced Shipment Notification

Use Advanced Shipment Notification (ASN) to automate and create asset records when your assets are in transit.

Before you begin

- Download the ASN template and share it with the vendor for completion.
- Before importing asset records using the ASN template, validate the following data requirements:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The model ID provided in the template is defined in your ServiceNow instance.
- The shipping address in the template matches the shipping address in the Location [cmn_location] table.
- The shipping carrier in the template is available in the Shipping carrier [sn_itam_common_shipping_carrier] table.

For more details on all ASN data validations, see Advanced Shipment Notification (ASN).

Role required: ham_admin, ham_user, procurement_admin, asset, sn_hamp.ham_asn_admin, or admin

About this task

Note:

If the asset records that you want to create belong to model categories linked to a CI class with identification rules defined for fields like the Asset tag, Serial number, or MAC address, you must provide details for at least one of these fields in the ASN template. Otherwise, the asset record isn't created. For example, if identification rules are defined for the Serial number and MAC address, you should provide a value for either of these fields.

The identification rules for a CI class are defined in the CMDB Identification and Reconciliation engine (IRE). For more details, see Identification rules and Create a CI identification rule. These rules help to uniquely identify the asset through these required fields and maintain accurate asset records.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Procurement**.
2. Select the **Advance shipment** tab.
3. Select **New**.
   The Create New Shipment Notification Upload page appears.
4. In the **Name** field, enter a unique name for the ASN upload.
5. Select **Attach file** to upload the updated ASN template (.xlsx) that you received from your vendor.

   Note: If you don't have a sample ASN template, select **Download template** and share it with the vendor for completion.

   The ASN template includes fields such as:

   - Serial number: Unique identifier for the asset
   - Asset tag: Alphanumeric tag assigned by your organization for asset tracking
   - Vendor: Vendor from whom the asset was purchased
   - PO number: Number associated with the purchase order

     Note: This field isn't the vendor PO number.

   - Model id: Model number of the product
   - SVC contract end date: Warranty expiration date for the asset
   - Carrier: Shipping carrier name
   - Tracking number: Number to track the assets that are in transit

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The **OT entity** and **MAC address** columns in the ASN template are used to create Operational Technology (OT) assets when the OT Asset Management application is activated.

6. Select **Import**.
   - The system performs validations and the status of the shipment notification upload transitions as follows:
     a. Moves from **Draft** to **Pending** after the import is initiated.
     b. Progresses through the **Extracting Rows** and **Importing** stages as the system processes the data.
     c. Finalizes the process by updating the status to one of the following based on the outcome:
        - **Completed**: The import finished successfully without issues.

          Note: Even if some rows fail validation, the overall import status is marked as **Completed**. Error details for failed records are displayed in the **Comment** field on the **Shipment Notifications Upload Stagings** tab.

        - **Failed**: The system couldn't complete the import process.
   - The **Shipment Upload Result** section summarizes the import by showing the number of records inserted, ignored, and skipped.
7. Select the **Shipment Notifications Upload Stagings** tab to view the state all rows included in the ASN template.
   A row can have any of the following states:
   - **Inserted**- Indicates that the row passed all validations and was considered for asset creation.
   - **Ignored**- Indicates that the row failed one or more validations and was excluded from asset creation. Rows containing software licenses are also automatically excluded, as software licenses are not supported through ASN import.

   The **Comment** field displays error details.

Result

For rows validated successfully:

- Asset records are created in the **In Transit** state.
- Asset records are linked to their corresponding purchase order line items.
- Purchase order statuses are updated to **Pending Delivery**.

What to do next

For rows that were ignored:

1. Review the **Comment** field to identify specific errors or details for each ignored row.
2. Resolve the identified issues within the ASN template.
3. Create a Shipment Notification Upload record to import the updated template.

Create an inventory stock order request

Create an inventory stock order request so that you can order new hardware in bulk for your stockrooms. After your request is approved, the Hardware Stock Order flow takes you through the process of requesting, sourcing, and receiving your order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

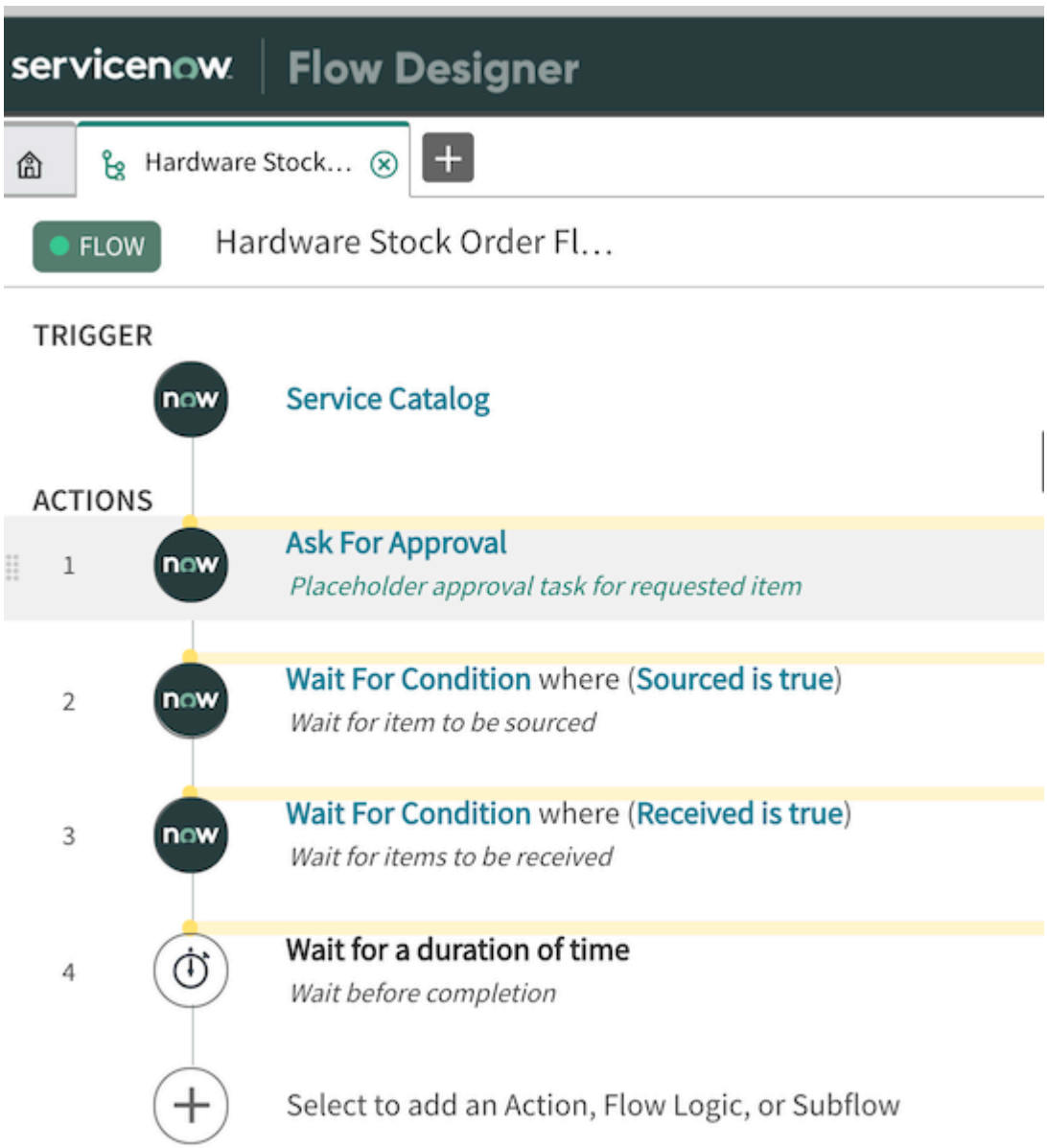
Before you begin
Role required: Inventory user

About this task
A stock order is a catalog request to replenish the stock in a stockroom.

You can manually create a hardware inventory stock order request. However, an inventory stock order request is automatically created from a stock rule trigger when the stock rule threshold breaches.

After your stock order request is approved, the Hardware Stock Order flow is triggered. The Workflow Studio application is used to create the Hardware Stock Order flow to take you through the entire process of requesting, sourcing, and receiving your order.

Hardware Stock Order Flow



Role required: inventory_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Inventory** > **Submit Stock Order**.
2. On the form, fill in the fields.

Hardware Inventory Stock Order form

Field	Description
Model	New hardware that you want to order.
Quantity	Amount of the new hardware that you want to order.
Stockroom	Stockroom where you want to stock the new hardware.
Comments	Details that are specific to your order request.

3. Click **Order Now**.
   The Order Status form displays all the order details. An existing service catalog request workflow takes care of all the required approvals for the request. You can now source your request.
4. Click the request number to open the request.
   The price of the request item is the price of the model. The price of the request is calculated as quantity of the request Item multiplied by the price of the request Item. The price of the request item that's shown in the Requested Items related list is the price of the model calculated by the quantity.

   Price of the Request Item is the Price of the Model and Price of the Request is calculated as Quantity of Request Item * Price of the Request Item.

   A catalog task is created after the request is approved.
5. Click **Catalog Tasks** and open the catalog task.
6. Click **Source Request**.
   The Source Request form layout lists the model name, the quantity of items to be sourced, and the total quantity of the hardware in stock.
7. Click **Add Transfer Order** or **Add Purchase Order** to source the request via a transfer order or a purchase order.

   The quantity mentioned in **Total in Stock** does not include the stock that's available in the destination stockroom.

   If the requested item is not available in any stockroom, then **Add Transfer Order** is disabled. If there are no available vendors for the requested item, then **Add Purchase Order** is disabled.

   To enable **Add Purchase Order**, do one of the following:

   - add a designated vendor by navigating to vendor items.
   - add a catalog item for the requested model with vendor details.

Manage RMA requests

Initiate a Return Merchandise Authorization (RMA) process by submitting an RMA request to initiate an RMA process with your vendor. You can repair or replace a faulty asset.

After you submit an RMA request for a defective asset, you must go through various tasks to finalize repairing or replacing the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To close an RMA request, you have to close each of its request lines separately. To close a line, you have to complete all the line's RMA tasks, and you must provide any necessary information about the line. You close a line by first closing its Assessment task. Then the defective asset is sent for either off-site or on-site repair. The line is closed after all these tasks are finished.

Submit an RMA request

Submit a Return Merchandise Authorization (RMA) request to initiate an RMA process with your vendor. You can repair or replace a faulty asset.

Before you begin

Role required: asset and inventory user

The asset, inventory_user, or itil role can only access the reports of the RMA request lines.

Procedure

1. Navigate to **All** > **Service Catalog** > **Asset Lifecycle** > **Asset RMA Order**.
2. To initiate an RMA request for a defective asset or consumable, click **Add**.
3. In the **Asset** field on the Add Row form, select the defective asset or consumable for which you want to initiate the RMA request.
   You can select multiple rows of assets and consumables. You can't select an excluded asset. For more information about asset exclusion, see Hardware Asset Management license exclusion.
   If you select a consumable, a **Quantity** field appears beside the **Asset** field. In the **Quantity** field, enter the number of defective consumables for which you want to initiate the RMA.
4. To add the selected assets or consumables, click **Add**.
5. To submit the RMA request, click **Submit**.

Result

The RMA request is created. A confirmation message appears with the RMA request number.

Closing an RMA request

After you submit an RMA request for a defective asset, you must go through various tasks to finalize repairing or replacing the asset.

To close an RMA request, you have to close each of its request lines separately. To close a line, you have to complete all of the line's RMA tasks, and you must provide any necessary information about the line. You close a line by first closing its Assessment task. Then the defective asset is sent for either off-site or on-site repair. The line is closed after all these tasks are finished.

The following procedures explain how to close a single line by closing its tasks. You must repeat these procedures for all the request lines.

Close the Assessment task for an RMA request

Close the Assessment task for an RMA request so that the defective assets can get repaired or replaced.

Before you begin

Role required: asset, inventory user, or itil

The asset, inventory_user, or itil role can only access the reports of the RMA request lines.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Inventory** > **Return Merchandise Authorization** > **All RMA Requests**.
   The RMA Request page appears and shows a list of RMA requests.
2. Open the RMA request that you want to close.
3. Under the RMA Request Lines related list, open an RMA request line.
4. Under the Asset RMA Tasks related list, open the Assessment task.
5. On the form, fill in the fields.

Assessment task form

Field	Description
State	State of the task.
Stockroom	Stockroom of the faulty asset or consumable.
Vendor	Vendor from which the asset was purchased.
Vendor RMA number	RMA reference number given by your asset vendor.
Assignment group	Group to which the RMA task is assigned.
Assigned to	User from the assignment group to whom the RMA task is assigned.
RMA action	Action to perform on the RMA. The asset can be repaired either on-site or off-site at the vendor's location. Choices are as follows: ○ **On-site** ○ **Off-site** Before you close the task, you must update this field.

6. Click **Close Task**.
   In the Asset form, the state of the faulty asset changes to In stock and the substate changes to Pending repair.

   If the faulty asset is part of an asset bundle, then after closing the Assessment task, the state of the bundle changes to In stock and Pending repair. If there are multiple RMA requests from a bundle, the state of the bundle remains as In stock, and Pending repair until all the RMA requests are closed.

Result

Based on whether you selected **On-site** or **Off-site** from the **RMA action** field, either the Asset RMA On-site flow or the Asset RMA Off-site flow is triggered to generate the related RMA tasks to complete the RMA process.

Close an RMA request with off-site repair or replacement

Close an RMA request in which a faulty asset is repaired or replaced in the location of the vendor.

Before you begin

Role required: asset, inventory user, or itil

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

After you select **Off-site** from the **RMA action** field on the Assessment task form, a Shipment task is generated under the Asset RMA Tasks related list in the RMA request line. Close the Shipment task and the other RMA tasks one by one to complete the RMA process.

You can cancel an RMA request line that was triggered from an Asset RMA Off-site flow if you have the inventory user or itil role. To cancel an RMA request line, you must do it before the Shipment task is closed.

Procedure

1. In the RMA Request Line form, under the Asset RMA Tasks related list, open the Shipment task.
2. On the form, fill in the fields.

Shipment task form

Field	Description
State	State of the Shipment task.
Vendor RMA number	RMA reference number given by your asset vendor.
Assignment group	Group to which the RMA task is assigned.
Assigned to	User from the assignment group to whom the RMA task is assigned.
Shipping carrier	Name of the carrier who ships the asset to the location of the vendor for repair or replacement. This field is a reference to the Shipping carrier [sn_itam_shipping_carrier] table.
Ship date	Date on which the asset is shipped. To close the task, you have to update this field.
Tracking number	Shipment reference number given by the carrier vendor.

3. Select **Close task**.
   In the Asset form, the state of the asset changes to In transit. In the RMA request line form, under the Asset RMA Tasks related list, a Vendor RMA decision task is generated.
4. In the RMA request line form, under the Asset RMA Tasks related list, open the Vendor RMA decision task.
5. On the form, fill in the fields.

Vendor RMA decision task form

Field	Description
State	State of the Vendor RMA decision task.
Assignment group	Group to which the RMA task is assigned.
Assigned to	User from the assignment group to whom the RMA task is assigned.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Vendor action	What the vendor wants to do with the faulty asset. Choices are as follows: ○ **Repair** ○ **Replace** To close the task, you have to update this field.

6. Based on what the vendor wants to do with the faulty asset, do one of the following:
   - If the vendor wants to repair the faulty asset, select **Repair** from the **Vendor action** field.
   - If the vendor wants to replace the faulty asset with a new asset, select **Replace** from the **Vendor action** field.
7. Select **Close task**.
   In the RMA request line form, under the Asset RMA Tasks related list, a Receive task is generated.
8. In the RMA request line form, under the Asset RMA Tasks related list, open the Receive task.
9. On the form, fill in the fields.

Receive task form

Field	Description
State	State of the Receive task.
Assignment group	Group to which the RMA task is assigned.
Assigned to	User from the assignment group to whom the RMA task is assigned.
Asset received	Information on whether you received the repaired or new asset. To close the task, you have to update this field.
Replacement asset	The new asset that you received as a replacement for the faulty asset. This option appears only when **Replace** is selected from the **Vendor action** field in the Vendor RMA decision task.

10. If you received the repaired asset, do the following:
    a. From the Asset received list, select **Yes**.
    b. Select **Close task**.
    In the Asset form, the state of the asset changes to In stock and the substate changes to Available.
11. If you received a new asset as a replacement for the faulty asset, do the following:
    a. From the Asset received list, select **Yes**.
    b. Add the new asset to the Asset [alm_asset] table of the Asset form and return back to the Receive task form.
    c. In the **Replacement asset** field, select the new asset.
    d. Select **Close task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

In the Asset form, the state of the new asset is In stock and the substate is Available. The **Acquisition method** field under the Financial section in the Asset form shows RMA Replacement.

In the Asset form, the state of the old faulty asset changes to Retired and the substate changes to Vendor credit.

If a vendor replaces an asset that was part of a bundle with a different model, then a warning appears when you select the new asset. The new model can't be added to the bundle. If you close the Receive task, the faulty asset is removed from the bundle. The state of the bundle changes to Build, the state of the new asset changes to In stock, and the substate changes to Available.

Result
The RMA process is complete.

Close an RMA request with on-site repair

Close an RMA request in which the faulty assets are repaired on-site.

Before you begin
Role required: asset, inventory user, or itil

About this task
After you selected **On-site** from the **RMA action** field on the Assessment form, an On-site repair task is generated under the Asset RMA Tasks related list in the RMA request line.

If the asset is successfully repaired on-site, then close the On-site repair task. The RMA process will be complete for the asset that was faulty.

If the asset could not be repaired on-site, you may send the asset for an off-site repair. If you send the faulty asset for an off-site repair, the Asset RMA Off-site flow triggers the required RMA tasks to complete the RMA process.

If you have the inventory user or itil role, then you can cancel an RMA request line that was triggered from an Asset RMA On-site flow until the Repair confirmation task is closed.

Procedure
1. In the RMA request line form, under the Asset RMA Tasks related list, open the On-site repair task.
2. On the form, fill in the fields.

On-site repair task form

Field	Description
Vendor RMA number	RMA reference number given by your asset vendor.
Assignment group	Group to which the RMA task is assigned.
Assigned to	User from the assignment group to whom the RMA task is assigned.
Repair confirmation	Confirmation on whether the asset was successfully repaired on-site or not. To close the task, you have to update this field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Action change	Option to send the faulty asset for off-site repair because it couldn't be repaired on-site. This option appears only if you selected **No** from the **Repair confirmation** field.

3. If the faulty asset was successfully repaired on-site, then do the following:
   a. From the Repair confirmation list, select **Yes**.
   b. Click **Close task**.
   In the Asset form, the state of the asset changes to In stock and the substate changes to Available. The RMA process is complete.
4. If the faulty asset could not be repaired on-site and you want to send it for an off-site repair, then do the following:
   a. From the Repair confirmation list, select **No**.
   b. From the Action change list, select **Off-site**.
   c. Click **Close task**.
   The Asset RMA Off-site flow is triggered and Shipment task is generated. See Close an RMA request with off-site repair or replacement for details.

   In the Asset form, the state of the asset changes to In stock and the substate changes to Pending repair.

Manage loaner assets

Request a loaner asset or consumable for a short period. You can also prepare the loaner asset or consumable for deployment and reclamation by using loaner asset tasks. Deploy the loaner asset or consumable for a specific period, and reclaim it on the return date.

Prepare, deploy, and reclaim loaner assets

Select and prepare the loaner asset or consumable for deployment and reclamation by using loaner asset tasks. Deploy the loaner asset or consumable for a specific period, and reclaim it on the return date.

Before you begin

To use an asset as a loaner asset or consumable, go to the asset record and set the **Asset function** field to **Loaner**. These assets are reserved for use as loaner assets. You can't use an asset that has the **Asset function** field set to anything other than **Loaner**. Only hardware, bundle, and consumables can be used as Loaner assets.

The Loaner Asset Orders related list in the Asset form shows all the loaner orders that the asset has served in the past and at present. When the consumable isn't in a stockroom, it shows only the current loaner asset order that it's serving at present.

Role required: inventory_user

About this task

Use the Loaner Asset Orders module to view and complete the loaner asset orders that were requested by the users.

The Hardware Asset dashboard gives a consolidated view of all the loaner asset orders that are in the New, Deployed, or Return Overdue states. For details, see Hardware Asset dashboard.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

There are readily available decision tables that you can use to customize the Loaner Asset Request Flow. For more details, see Hardware Asset Management flow customization.

Procedure

1. Navigate to **All** > **Inventory** > **Loaner** > **Loaner Asset Orders**.
2. Open a loaner asset order record.
3. Under the Loaner Asset Tasks related list, open the Prepare task.
4. On the form, fill in the fields.

Prepare task form

Fields	Descriptions
Asset	Asset that is used to fulfill the loaner asset request. When the Location field value of the Loaner Asset Request form is a service location of multiple stockrooms, the Asset field shows the list of loaner assets that are available in all those stockrooms in addition to the loaner assets available in the stockroom of that location. For more details on service locations, see Associate a stockroom with service locations. **Note:** The stockroom that is available at the specified location is preferred for fulfilling the loaner asset request. The stockrooms that support the specified location are considered only when there isn't any stockroom in that location.
State	State of the task.
Assigned to	Person who is assigned the task of fulfilling the Deploy task.

5. After you physically prepare the hardware asset for deployment, select **Close Task** to close the Prepare task.
   After the Prepare task is completed, a Deploy task is created under the Loaner Asset Tasks related list. On the Asset record [alm_asset] table, the following changes happen:
   - The state of the loaner asset changes to In stock.
   - The **Reserved for** field is automatically set to the name of the user who the loaner asset was requested for.
   - The substate changes to Pending install.
6. Open the Deploy task.
7. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Deploy task form

Fields	Descriptions
State	State of the task.
Assigned to	Person who is assigned the task of fulfilling the Deploy task.

8. Deploy the hardware asset.
9. Set the **State** field to **Closed Complete**.
10. To close the Deploy task, select **Close Task**.

    On the Asset record [alm_asset] table, the following changes happen:

    - The state of the loaner asset changes to In use.
    - The **Stock room** field changes to Null.
    - The **Assigned to** field is automatically set to the name of the user who the asset was requested for.
    - If you requested the loaner asset for a third-party vendor, then the **Managed by** field is automatically set to the name of the user who the asset was requested for.

    For a consumable, the state changes to Consumed.

    Two days before the return date, the users who requested the asset will receive an email notification about the reclaim. One day before the return date, a Reclaim task is created under the Loaner Asset Tasks related list.

11. Open the Reclaim task.
12. On the form, fill in the fields.

Reclaim task form

Field	Description
Stockroom	Stockroom where the returned asset is stored. If you entered a stockroom different from where you received the loaner asset, then a warning message appears which says that the existing loaner orders from the initial stockroom might be affected.
Returned on	Actual date when the asset was returned.
State	State of the task.
Assigned to	Person who is assigned the task of fulfilling the Reclaim task.
Asset returned	Option to mark the asset as returned. The Reclaim task can’t be closed if the asset isn’t returned.
Asset functional	Functional status of the loaner asset after it's reclaimed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If the asset isn't functional, the state of the asset changes to In stock and the substate changes to Pending repair.

13. To close the Reclaim task, select **Close Task**.
14. If a user returns the asset before the return date, do the following:
    a. Select **Reclaim**.
    b. On the Reclaim Asset form, update the fields.
    c. Close the Reclaim task.
    On the Asset record [alm_asset] table, the following changes occur:
    - The state of the loaner asset changes to In stock.
    - The substate changes to Available.
    - The **Stockroom** field is automatically set to the value that was selected on the Reclaim task form.
    - If the asset is assigned to a future loaner order, the substate changes to Reserved and reflects the details of the loaner order.

Track shipments using the integration framework

Track your shipments in real time by integrating your ServiceNow instance with your third-party carrier's application through the integration framework provided by the IT Asset Management application.

View the carrier integration profile details

View the details of the carrier API used to connect your ServiceNow instance to the third-party shipping carrier application.

Before you begin

Role required: admin, domain_admin, asset, inventory_admin, or sn_hamp.ham_system_admin

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Carrier integration profiles**.
   The third-party carrier application automatically inserts records into the Carrier integration profiles list. You can also create a carrier integration profile.
3. Select the carrier integration profile of your carrier.

Carrier Integration Profile Details form

Field	Description
Name	Name of the integration profile.
Connection details	Reference to the Connection and Credentials Aliases table that stores the credentials of the customer. **Note:** Your credentials must be updated in the Connection and Credentials Aliases table so that you're authenticated to connect to the carrier API.
API	Name of the script that has the integration business logic.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Job	Name of the scheduled job that invokes the carrier API to fetch the shipments details. This job is created by a job that runs daily, The ITAM: Process integration profiles and stale shipment job.
Active	Option that indicates the status of the integration profile. **Note:** Only users with the admin or domain_admin role can deactivate the integration profile but they can't delete the integration profile. When an integration profile is deactivated, the associated job that invokes the carrier API is deactivated automatically.

View hardware asset shipment details

View all hardware asset shipment details in a single place in the Hardware Asset Workspace.

Before you begin

Role required: inventory_user (read) or inventory_admin

About this task

The Shipment list shows all the shipment records initiated by the shipment tasks of various flows. For details, see Task closures that create shipment records.

A shipment record is created automatically whenever a shipment task of a flow or process is closed.

Note:

The Shipment [sn_itam_common_shipment] table also has the Currency, Delivery services cost, and Parcel weight fields. However, these fields aren't shown on the Shipment form.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Shipments**.
3. Select a shipment record to view the shipment details.

Shipment Details form

Field	Description
Shipment number	Auto-generated and unique identifier for the shipment record.
Tracking number	Unique carrier tracking number for the shipment. Multiple orders or line items can have the same tracking number when they belong to the same shipment. Also, multiple line items that belong to the same order can have different tracking numbers when they're part of different shipments.
Stage	Stage of the shipment record. A shipment can be in one of the following stages:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Draft ○ On Order ○ Prepare ○ In Transit ○ Delivered ○ Canceled When a shipment has multiple orders, the Stage of the shipment record changes to **Delivered** when the shipment assets of an order are delivered.
Shipped from	Location from where the assets are shipped. This field is populated with the corresponding field of the order that created this record.
Shipped to	Location to which the assets are shipped. This field is populated with the corresponding field of the order that created this record.
Shipped by	Name of the person who shipped the assets. This field is populated with the corresponding field of the order that created this record.
Ship date	Date on which the assets are shipped. This field is populated with the corresponding field of the order that created this record. The date corresponds to the date on which the ship task of the source is closed.
Receive date	Date on which the assets are received. This field is populated with the corresponding field of the order that is received first as part of the shipment. The date corresponds to the date on which the receive task of the source is closed.
Received by	Name of the person to whom the assets are sent. This field is populated with the corresponding field of the order that is received first as part of the shipment.
Carrier	Reference to the shipping carrier record.
Carrier status	Status of the shipment. **Note:** This field is populated only when you integrate with your third-party carrier applications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Carrier pick-up date	Date on which the carrier picked up the assets. **Note:** This field is populated only when you integrate with your third-party carrier applications.
Carrier delivered	Date on which the carrier delivered the assets. **Note:** This field is populated only when you integrate with your third-party carrier applications.
Carrier link	Link provided by the carrier to track the shipment.
Stale shipment	Option that indicates whether the shipment record is stale. This option is read-only.

Stale shipments

Shipments that are delayed due to various reasons such as an incorrect tracking number, the loss of a shipment package during transit, and invalid connection details are considered stale shipments.

The ITAM: Process integration profiles and stale shipment job runs daily to check for any stale shipments. A shipment record that is not updated by the carrier even after the integration profile job has run for the maximum wait days for a carrier is marked as stale shipment.

The tracking number of the shipment record that is marked stale isn't sent to the carrier for further tracking. If you know the reason that a shipment is late, you can decide to continue tracking it. For more information, see Continue to track delayed shipments.

Note: You can view the list of shipments that weren't updated with the tracking information from the integrated carrier through the Stale shipments important actions card in the Inventory view. For more information, see Inventory view.

Continue to track delayed shipments

Continue to track a stale hardware asset shipment that is delayed if the reason for the delay is known.

Before you begin

Role required: inventory_user (read),inventory_admin, or asset_integration_admin

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Shipments**.
3. Select a shipment record that you want to track.
4. On the Shipment details form, select the **Ignore stale check** check box.
5. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The **Stale shipment** check box on the Shipment details form is automatically cleared.
- The tracking number of this shipment is sent to the carrier for tracking and this shipment record won't be marked as stale again.

Track a hardware asset shipment

Track the progress of your hardware asset shipment that isn't delivered and that has a carrier associated with an active integration profile.

Before you begin

Role required: inventory_user (read) or inventory_admin.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Shipment** list, select **Shipments**.
3. Select a shipment record that you want to track.
4. Select **Track now**.

Result

The following fields on the Shipment details form show the tracking details received from the carrier:

- Carrier status
- Carrier pick-up date
- Carrier delivered date

Inventory and stockroom operations

Manage hardware asset inventory and stockroom operations, from receiving and storing assets to monitoring stock levels, conducting audits, and tracking asset location.

Perform these tasks as needed to manage day-to-day inventory and stockroom operations in HAM.

Task details

Task	Description
Receive assets in a stockroom	Receive incoming hardware assets into a stockroom and update asset records to reflect the new inventory.
Pick assets for deployment	Pick hardware assets from stockroom inventory to fulfill deployment requests and transfer orders.
Put away assets in a stockroom	Store returned or newly received hardware assets in designated stockroom locations and update inventory records.
Audit hardware asset inventory	Conduct a physical inventory audit to reconcile stockroom records with actual hardware asset counts.
View RFID information of assets	Locate your assets using the RFID.
Track asset location using indoor maps	Use indoor maps to view the physical location of hardware assets within a facility in near-real time.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Task details (continued)

Task	Description
Manage your inventory through pallet assets	Group hardware assets on pallets to streamline bulk receiving, storage, and transfer operations in your stockroom.
View stockroom details	Get an overview of your stockrooms.

Related topics

Stockrooms

Stock rules

Manage the receiving of assets at stockrooms in the Hardware Asset Workspace

Receive hardware and consumable assets at stockrooms from any workflow at a centralized location on the stockroom form in the Hardware Asset Workspace.

Depending on the number and type of assets that you want to receive, you can select from the following options to receive assets at your stockroom:

- Receive a single hardware asset at your stockroom.
- Receive one or more hardware and consumable assets from the list of shipment assets.
- Import and receive hardware and consumable assets in bulk through an Excel template.

Note: You should have the ham_admin role to import asset records using the Excel template.

For more details, see Receiving hardware and consumable assets at stockrooms.

Receive a hardware asset at a stockroom in the Hardware Asset Workspace

Receive a single hardware asset that has arrived at your stockroom, whether it's part of a workflow or not, in the Hardware Asset Workspace.

Before you begin

Role required: inventory_user or asset

About this task

This task enables you to receive assets in the following scenarios:

Receiving a hardware asset with an existing record

When you're receiving a hardware asset from workflows such as a transfer order or Return Merchandise Authorization (RMA), where a repaired asset has arrived at your stockroom, the asset record exists in your ServiceNow instance. You can search for the existing asset record using the Asset tag or Serial number and then receive the asset, which automatically closes the receive task of the source workflow.

Receiving a new hardware asset at your stockroom

When you're physically receiving a new hardware asset at your stockroom, it's likely that the asset record isn't present in your ServiceNow instance. You can receive new assets through workflows like a purchase order, asset refresh, or RMA with a replacement asset. Through this task, you can create an asset record and associate it with the source workflow, which automatically closes the receive task linked to the source workflow.

Receiving an independent hardware asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can receive a hardware asset that isn't part of any workflow and has arrived at your stockroom.

Important: You can also receive an enterprise asset only if the Enterprise Asset Management application is activated.

Procedure

1. Navigate to **Workspaces** > *Hardware Asset Workspace* > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom for which you want to receive the hardware asset.
4. Select **Receive assets**.
5. Find the hardware asset that you want to receive.

   a. In the Receive assets dialog box, enter the Asset tag or Serial number of the asset that you want to receive in the search field.

   b. Select **Search**.

   - If the asset record is found, it appears in the Assets list.

     Note:

     The following asset details are displayed:

     - **Display name**
     - **Model category**
     - **Asset tag**
     - **Quantity**
     - **State**
     - **Stockroom**
     - **Location**

   - If the asset record isn't found, a message appears indicating that the asset isn't found, along with an option to create the asset record.

6. Receive the hardware asset in your stockroom.
   - If the asset record is found in the Assets list, select the asset record and then select **Receive**.

     Result

     - The State of the asset changes from **In transit** to **In stock**.
     - The **Stockroom field** on the asset form is automatically updated with the stockroom at which you received the asset.
     - The receive task in the source workflow associated with the asset that you received is automatically closed.

   - If the asset record isn't found, create one to receive.

     a. Select **Create asset**.

     b. In the Create asset dialog box, enter the details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create asset dialog box

Field	Description
Model	Specific product model of the asset. This field is required.
Model Category	Model grouping of the asset. This field is required.
Serial Number	Serial number of the asset. **Note:** Depending on the Model Category that you selected, this field is either required or optional. For instance, Serial number is required for Computer model category. Unique fields that are required on the asset records are defined by the identification rules on the associated CI classes defined in the Identification and Reconciliation engine (IRE). When you create an asset whose model category is linked to a CI class with an identification rule, you should provide details for at least one of the fields, such as Asset tag, Serial number, and MAC address, that uniquely identify the asset.
Asset Tag	Tag to help track the asset.
Mac Address	MAC address of the asset.
Stockroom name	Name of the stockroom that you selected to receive the asset. This field is automatically populated and is read only.
Source type	Source workflow to which the asset that you're receiving belongs. ▪ To receive the asset from a purchase order, select **PO**. ▪ To receive the asset from the RMA flow, select **Asset RMA**. ▪ To receive the asset through asset refresh workflow, select **Refresh**.
Source ticket	Request number of the source workflow that's associated with the asset that you want to receive. ▪ To receive an asset from a purchase order or asset refresh order, select the associated PO line number. ▪ To receive an asset from an RMA order, select the associated RMA line number. **Note:** Source tickets are displayed based on the model and source type that you selected.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important:

Providing the Source type and Source ticket details is optional when creating an asset record. However, including these details links the hardware asset to the source workflow. This link results in the automatic closure of the Receive task in the source workflow when the asset is created. If you don't include these details, the asset record is still created, but you should close the Receive task manually in the source workflow.

Note the following points before you consider creating an asset record:

- If you're receiving an asset from an RMA workflow, you can create an asset record first. Later, you can manually add the details of this asset in the Asset RMA receive task, and then close the task.
- If you're receiving an asset from a purchase order, you can create an asset record for the asset you physically received. However, you can't receive the same asset later through the Receive task on the purchase order.

c. Select **Create**.

Result

- An asset record is created with State as **In stock** and Substate as **Available**.
- The **Stockroom** field on the asset form is automatically updated with the stockroom at which you received the asset.
- The receive task in the source workflow is automatically closed only if you provided the Source type and Source ticket details.

Receive assets from inbound shipments at your stockroom in the Hardware Asset Workspace

Receive hardware and consumable assets from one or more shipments that are in transit to your stockroom in the Hardware Asset Workspace. You can receive assets from shipments originating from any workflow.

Before you begin

Role required: inventory_user or asset

About this task

If you don't have the details of the assets you want to receive at your stockroom, you can view the list of assets that are on their way and then receive them. You can receive the complete quantity of consumables in the shipments, not a partial quantity.

Assets from an inbound shipment can be received under the following conditions:

- The assets must have a serial number and an asset tag.
- The assets must be in the In-transit state and linked to a shipment record.
- Enterprise assets can be received only if the Enterprise Asset Management application is activated.

Procedure

1. Navigate to **Workspaces** > *Hardware Asset Workspace* > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom for which you want to receive hardware or consumable assets.
4. Select **Receive assets**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. In the Receive assets dialog box, select **View all inbound assets**.
   A list of all shipment assets currently on their way to the stockroom is displayed.

   The following details of a shipment are displayed:

   - **Asset**: Display name of the asset.
   - **Stage**: Stage of the shipment.

     Note: Only shipments that are In transit are displayed.

   - **Model categories**: Model grouping of the asset.
   - **Quantity**: Number of assets to be received.
   - **Asset tag**: Tag to track the asset.
   - **Serial number**: Serial number of the asset.
   - **Tracking number**: Identifier to track the shipment.
   - **Source**: Details of the source workflow including the request number through which you're receiving the asset. The source could be a transfer order line, a purchase order line, an RMA order line, or any other workflow through which the asset is received.
6. Select the shipment asset that you want to receive and then select **Receive**.

Result

If the asset details are valid, the following changes occur:

- The assets are received successfully.
- The State of the assets changes from **In transit** to **In stock**, and the Substate of the assets changes from **Reserved** to **Available**.
- The **Stockroom** field on the asset form is automatically updated with the stockroom at which you received the assets.
- The Status of the shipment tasks associated with the assets changes to **Delivered**.
- The receive tasks in the source workflows are automatically closed.

Note: If any of the asset details are invalid, an error message in shown in the **Alert** column for the corresponding asset record. You should resolve the error before receiving the assets.

Import and receive assets in bulk at your stockroom in the Hardware Asset Workspace

Receive multiple hardware and consumable assets at your stockroom by importing the asset records using an Excel template in the Hardware Asset Workspace.

Before you begin

Role required: ham_admin

About this task

This task enables you to receive assets with existing records, and also new assets, only if you have provided valid asset details in the template.

When you import a template with asset details, extensive validation is performed on each row. The records from the template and the validation results are stored in the Import asset row [sn_itam_cmn_import_asset_row] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The *sn_itam_common.receive_assets_batch_size* system property determines how many asset records are processed at once when logging imports and receiving jobs. By default, the system handles 1,000 asset records per batch. With the admin role, you can adjust this number to optimize the system performance and handle large volume of assets. This system property supports domain separation by using the application property.

The asset data validation takes care of the following points:

- Child assets can't be received.
- Enterprise assets can only be received if the Enterprise Asset Management application is activated.
- Operational Technology (OT) assets can only be received if the OT Asset Management application is activated.
- Assets can be received only if the following conditions are fulfilled:
  - The required fields are provided.
  - The asset quantity is valid.
  - The Source type and Source ticket details are valid.
- Asset from purchase order lines can be received only in Zurich and later releases.
- Asset whose model doesn't match the model in the purchase order line can't be received.
- Asset bundles can't be received.

Procedure

1. Navigate to **Workspaces** > *Hardware Asset Workspace* > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom for which you want to receive hardware or consumable assets.
4. Select **Import receiving log**.
5. Prepare the asset data for import, and then proceed with the import.

   a. Download, update, and save the asset import template.

      i. Select **Download Template**.

      ii. Fill in the template with the details of the assets that you want to import and receive.

      The template has the following columns:

      - **Asset tag** and **Serial number**: These fields are used to determine whether the asset record exists in your ServiceNow instance or not.
      - **Model category**, **Model name**, and **Model number**: The fields required to validate an asset record depend on the model category. For example, a serial number is required for the Computer model category, and you can receive assets of that model category only if the serial number is provided. Additionally, if an asset record isn't found, fields related to the model are required to create one using the Asset tag and Serial number values provided in the template.
      - **Quantity**: This field should have a value of 1 for hardware assets, and for consumables, it should reflect the number of assets you're receiving. You can't receive a partial quantity of consumables.
      - **Manufacturer**: Asset manufacturer.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Source type**: The source type is the workflow through which you're receiving the asset. You should enter values that correspond to the workflows, such as the following:
  - `TOL` for transfer order line
  - `POL` for purchase order line
  - `RMAL` for Return Merchandise Authorization (RMA)

  Note: This field is required for a consumable asset so that the correct asset is identified and received.

- **Source ticket**: The request number of the source workflow that's associated with the asset that you want to receive, such as TO line number, PO line number, or RMA line number.

  Note: This field is required for a consumable asset so that the correct asset is identified and received.

- **Reserved for**
- **Parent asset**
- **MAC address** and **OT entity**: These fields are required to identify and receive OT assets.

iii. Save the template.

b. On the Create New Import asset data form, fill in the details.

i. In the **Name** field, provide a name for the asset import record.

ii. Select **Attach file** and then select the asset import template that you created in step a.

c. Select **Import**.

- The **Import asset data rows** tab is displayed, showing all the asset record rows that were imported through the Excel template.

  Note: Depending on the number of records being processed, it might take some time for the asset records to appear in the Import Asset Data Rows tab.

- The **Status** column indicates whether the asset is ready to be received. Here are the possible values:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Ready to receive**: This status indicates that the asset data is valid and ready to be received at your stockroom.
- **Receive error** (Asset not found): This error indicates that no asset records match the details you provided in the template. However, since the details are valid, asset records will be created when you proceed with the Receive action.
- **Import error**: This error is because of the invalid asset data provided in the asset import template, such as duplicate serial numbers or invalid quantity for hardware assets.

- The **Alert** column provides details about any errors and the steps that you should take to resolve them and successfully receive the asset.

Note: You can proceed to receive assets with a status of Ready to receive or Receive error.

For assets with a status of Import error, correct the data issues in your template and create a new import record to import the corrected template. You can then receive the assets.

6. Receive assets at your stockroom.
   a. Select the import data rows corresponding to the assets that you want to receive.
   b. Select **Receive**.

If you received the assets with Status Ready to receive, the following changes happen:

- The State of the assets changes from **In transit** to **In stock**, and the Substate of the assets changes from **Reserved** to **Available**.
- The **Stockroom** field on the asset form is automatically updated with the stockroom at which you received the assets.
- The receive tasks in the source workflows associated with the assets that you received are automatically closed.

If you received the assets with Status Receive error, the following changes happen:

- Asset records are created with State as **In stock** and Substate as **Available**.
- The **Stockroom** field on the asset form is automatically updated with the stockroom at which you received the assets.
- The receive task in the source workflow is automatically closed only if you provided the Source type and Source ticket details.

Manage picking hardware assets within your stockroom for Hardware Asset Management workflows

Enable the Asset pick task explicitly for your stockroom and provide granular location details of the asset to facilitate asset picking within your stockroom.

Enable the Asset pick task for your stockroom in the Hardware Asset Workspace

Enable the Asset pick task for your stockroom so that the task is automatically added to Standard Hardware Asset requests, Hardware Asset Refresh requests, and Sourcing workflow.

Before you begin

Role required: inventory_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of available stockrooms, select the stockroom for which you want to enable the Asset pick task.
4. On the **Stockroom Details** form, select the **Warehouse tasks required** check box.
5. Select **Save**.

Add aisles and spaces to a stockroom in the Hardware Asset Workspace

Add details of aisles and spaces in a stockroom to provide granular location details of an asset in that stockroom. The aisle and space details enable you to locate and pick an asset in the stockroom.

Before you begin

Role required: inventory_user

About this task

A space is associated with an aisle in the stockroom. You can add a space only after you have added a minimum of one aisle to the stockroom.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select a stockroom.
4. Select the **Aisle and spaces** tab.
   The list of existing aisles and spaces in that stockroom is displayed.
5. Add aisles to the selected stockroom.

   a. Select **Add aisle**.

      The **Add aisle** dialog box is displayed.

   b. In the **Aisle** field, enter a unique identifier for the aisle.

      You can enter any string value in this field. For example, `aisle_0001`.

   c. **Optional:** To add more aisles, select the Add icon (+) and enter a unique identifier for the aisle in the **Aisle** field.

   d. Select **OK**.

   The aisle is added to the list in the Aisle and spaces tab.
6. Add a space to an aisle in the stockroom.

   a. Select **Add space**.
      The **Add space** dialog box is displayed.

   b. In the **Aisle** field, select the aisle for which you want to add a space.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. In the **Space** field, enter a unique identifier for the space.

   You can enter any string value in this field. For example, `space_0001`.

d. **Optional:** To add more spaces, select the Add icon (+) and enter a unique identifier for the space in the **Space** field.

e. Select **OK**.

- The space is added to the list in the Aisle and spaces tab.
- The Display name of the space is automatically set based on the **Aisle** and **Space** fields. For example, the display name of the space whose aisle is aisle_001 and space is space_001 is **aisle_001 - space_001**.

View the open hardware asset pick tasks for your stockroom

View the open hardware asset pick tasks for your stockroom to get the details of the tasks that need action.

Before you begin
Role required: inventory_user

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom.
   In the Open stockroom tasks section, the **Open pick tasks** card displays the number of open pick tasks.
4. Select the **Open pick tasks** card.

Result
The list of open asset pick tasks for the stockroom is displayed.

What to do next
Manage all the hardware asset pick tasks assigned to you by using the Mobile Agent application. For details, see Manage hardware asset pick tasks using the Mobile Agent application.

Manage asset put away using the Hardware Asset Workspace

Enable the Asset put away task explicitly for your stockroom to put away the assets from the receiving bay in the designated aisle-space. View the open Asset put away task and close it after specifying the aisle-space value to move the asset in the stockroom.

Enable the asset put away task for your stockroom

Enable the Asset put away feature for your stockroom so that the Asset put away task is automatically created to track asset movement.

Before you begin
Role required: inventory_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of available stockrooms, select the stockroom for which you want to enable the Asset pick task and Asset put away task.
4. On the Stockroom Details form, select the **Warehouse tasks required** check box.
5. Select **Save**.

Result
You can perform asset put away for in stock assets in the stockroom.

View open put away tasks for your stockroom

View the open put away tasks for your stockroom in the Hardware Asset Workspace to get the details of the tasks that need action.

Before you begin
Role required: inventory_user

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. View the open put away task either from the Inventory overview section or the All Stockrooms tab.
   - In the Inventory overview section, select the **Open put away tasks** number.
   - In the **Stockrooms** tab, select a stockroom. In the Open stockroom tasks section, select the **Open put away tasks** number.

Result
The list of open Asset put away tasks are displayed.

What to do next
Put away the asset in the desired drop-off location in the stock room. Close the Asset put away task after adding the **Drop off location** field value in the Asset put away task form. For more information about closing Asset put away task, see Close an Asset put away task.

Create an Asset put away task

Create an Asset put away task manually for the In stock assets in the Hardware Asset Workspace to track the movement of assets within the stockroom.

Before you begin
Role required: inventory_user

About this task
You can create an asset put away task in the Hardware Asset Workspace for the In stock assets for which the **Aisle and Space** field value isn't already specified. When you create a put away task, you can either directly close the task or save it. To close the task, the **Drop off location** field value is required.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Open the Create New Asset put away task form either from the Inventory overview section or the All Stockrooms tab.
   - In the Inventory overview section, select the **Open put away tasks** card and select **New**.
   - In the Stockrooms tab, select a Stockroom. Then in the Open stockroom tasks section, select the **Open put away tasks** card. Select **New**.
3. On the Asset put away task form, fill in the fields.
   For a description of the field values, see Asset put away task fields.
4. Save your modifications.
   - To save your changes and create the Asset put away task, select **Save**.
   - To save your changes and close the Asset put away task, select **Close task**.

   Note: **Drop off location** field value is required to close the Asset put away task.

Close an Asset put away task

Add the asset drop-off location for an open Asset put away task and close it in the Hardware Asset Workspace.

Before you begin
Role required: inventory_user

About this task
You can bulk close selected Asset put away tasks that are open and assigned to you by specifying a drop-off location, which moves all associated assets to that location. You can also close individual tasks by specifying a drop-off location.

Note: When you make the following changes to a hardware asset, the associated Asset put away task is closed:

- When the asset's **Aisle and Space** value is filled, the associated Asset put away task for the asset is closed, and the **State** field is updated to **Closed Complete**.
- When the asset's State field is updated from In stock to some other value without adding the **Aisle and Space** field value, the associated Asset put away task is closed and its state is updated to Closed Incomplete.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Open the put away task either from the Inventory overview section or the **All Stockrooms** tab.

Option	Description
From the Inventory overview section	**a.** In the Inventory overview section, select the **Open put away tasks** card. **b.** Select the **Number** link to open the Asset put away task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
From the All Stockrooms tab.	○ In the **All Stockrooms** tab, select a stock room. ○ In the Open stockroom tasks section, se lect the **Open put away tasks** card. ○ Select the **Number** link to open the Asset put away task.

3. In the Put away task form, select the **Drop off location** value.
4. Save your modifications or close the put away task.
   - To close the put away task, select **Close task**.
   - To save your changes and stay on the same page, select **Save**.
   - To close multiple put away tasks, select **Bulk close**.

     The **Select Assets** dialog box is displayed listing the Asset put away tasks assigned to you. Select the tasks that you want to close and select **Close Task**.

Result

- Closed tasks aren't displayed in the Open put away tasks list.
- The task closure is captured in the **Activity** tab. The name of the user who closed the task is shown in the work notes.

Audit hardware asset inventory

Perform scheduled or blind audits of stockrooms and other locations, such as offices or datacenters, to confirm accurate inventory information.

The asset audit process involves verifying and reconciling assets between a physical location or stockroom and the ServiceNow instance. First, assets are identified by scanning their asset tag, serial number, or model barcode. Next, the records in the ServiceNow instance are checked to determine whether they match the scanned assets and the audit result is generated. You can view precise inventory information through detailed lists and reports.

You can create an audit record in the Hardware Asset Management application or the ServiceNow Agent app.

- Use the Hardware Asset Management application to create a scheduled audit record. For more information about creating a scheduled audit record, see Create an audit record in the Hardware Asset Management application.
- Use the ServiceNow Agent app to create a blind or unscheduled audit record. For more information about creating a blind or unscheduled audit record, see Create an audit record using the ServiceNow Agent app.

When an inventory audit record is created, it's saved in the Asset Audits table, depending on the configuration for *sn_hamp.migrate_hamaudit* system property.

- When the *sn_hamp.migrate_hamaudit* system property is set to **true**, the audit record is saved in the Asset Audits [sn_itam_common_asset_audit] table.
- When the *sn_hamp.migrate_hamaudit* system property is set to **false**, the audit record is saved in the Asset Audits [sn_hamp_asset_audit] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Starting with Hardware Asset Management version 15.0.0, the audit inventory has been enhanced to store audit records in the common Asset Audits [sn_itam_common_asset_audit] table. Before enabling audit enhancements and switching to the common Asset Audits table, you must complete all audit records that are in either **In progress** or **New** status.

Using the ServiceNow Agent app, you can scan the assets in the inventory and complete the audit process. The Hardware Asset Management application reconciles scanned assets with ServiceNow records to generate audit results. For more information about scanning assets, see Complete a single scan inventory audit using the ServiceNow Agent app.

Create an audit record in the Hardware Asset Management application

Create an audit record to audit your inventory to determine the accuracy of your hardware and consumable assets and to optimize the inventory.

Before you begin

Role required: asset

The asset or inventory_user role can only access the Asset Audits [sn_hamp_asset_audit] reports.

Note:

- When the *sn_hamp.migrate_hamaudit* system property is set to **true**, you're required to have the asset role, along with either the sn_itam_common.asset_audit_admin or sn_itam_common.asset_audit_user role.
- When the *sn_hamp.migrate_hamaudit* system property is set to **false**, only the asset role is required.

Procedure

1. Create an audit.

Interface	Action
Core UI	**a.** Navigate to **Asset Audits** > **Asset Audits** form. **b.** Select **New**. **Important:** If you have set the *sn_hamp.migrate_hamaudit* system property value to **true**, to enable audit enhancements in your ServiceNow® instance, you can't create an asset audit record from the core UI.
Hardware Asset Workspace	**a.** Navigate to **All** > *Hardware Asset Workspace* > **Inventory view**. **b.** Select the **Asset audit** tab. The **Asset audit** tab displays a list of existing asset audits. **c.** Select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. On the Create New Asset Audits form, fill in the fields.

   For a description of the field values, see Asset audit fields.

   Note: The audit result fields, such as **Expected**, and **New**, can't be edited. When the asset is scanned in the inventory using the ServiceNow Agent app, values are automatically updated in these fields. For a detailed description of the audit result field values, see Audit results.

3. Select **Save**.

Result

- The asset audit inventory record is created and appears with the **Expected Assets** and **Scanned Assets** tabs.
- The audit record is saved in the Asset Audits [sn_itam_common_asset_audit] table when the *sn_hamp.migrate_hamaudit* system property is set to **true**.
- The audit record is saved in the Asset Audits [sn_hamp_asset_audit] table when the *sn_hamp.migrate_hamaudit* system property is set to **false**.

What to do next

Scan the assets in the inventory using the ServiceNow Agent app.

Related topics

Complete a single scan inventory audit using the ServiceNow Agent app

Complete multi scan inventory audit using the ServiceNow Agent app

View audit results

Create an audit record using the ServiceNow Agent app

Create an inventory audit record using the ServiceNow Agent app.

Before you begin

Role required: asset, and sn_itam_common.asset_audit_admin, or sn_itam_common.asset_audit_user

Note:

- When the *sn_hamp.migrate_hamaudit* system property is set to **true**, you're required to have the asset role, along with either the sn_itam_common.asset_audit_admin or sn_itam_common.asset_audit_user role.
- When the *sn_hamp.migrate_hamaudit* system property is set to **false**, only the asset role is required.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. Tap **Asset**.
3. Select the audit that you want to perform.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Audit type	Action
To perform stockroom audits	**a.** On the navigation bar, tap the Stockroom audits menu. **b.** Tap the more actions icon ( ). **c.** Tap **New stockroom audit**.
To perform location audits	**a.** On the navigation bar, tap the Location au dits menu. **b.** Tap the more actions icon ( ). **c.** Tap **New location audit**.

4. On the form, fill in the fields.

New stockroom audit form or New location audit form

Field	Description
Stockroom **Note:** This field appears if you're creating a stockroom audit.	Stockroom where you want to perform the audit.
Location **Note:** This field appears if you're creating a location audit.	Location where you want to perform the audit.
Aisle and space **Note:** This field appears if you're creating a stockroom audit.	Aisle and space for which you want to perform the audit.
Include child locations **Note:** This field appears if you're creating a location audit.	Option to include child locations in the audit.
Model category	Model category for which you want to perform the audit.
Include consumables **Note:** This field appears if you're creating a stockroom audit.	Option to include consumable assets in the inventory audit. The available options are: ○ Yes ○ No The default populated value for this field is derived using the *sn_itam_common.set_default_include_consuma* system property.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ When this system property value is set to **yes**, the default value for the **Include consumables** field is set to **Yes**. ○ When this system property value is set to **no**, the default value for the **Include consumables** field is set to **No**.
Scan method	Scan method to be used to scan the assets. The available options are: ○ Single scan ○ Multi scan ○ When the **Include consumables** field is set to **Yes**, the **Scan method** field value is automatically set to **Single Scan** and can't be edited. ○ When the **Include consumables** field is set to **No**, the **Scan method** field becomes editable, enabling you to select the scan type. Depending on the selected scan method for the audit record, you can scan the assets in the inventory using the ServiceNow Agent app. ○ To complete asset scanning for the single scan audit record, see Complete a single scan inventory audit using the ServiceNow Agent app. ○ To complete asset scanning for multi scan audit records, see Complete multi scan inventory audit using the ServiceNow Agent app.

5. Tap **Submit**.

Result

- An audit record is created and listed on the **Open** tab.
- The audit result fields are displayed on the audit **Details** tab.

  For a detailed description of the audit result field values, see Audit results.

What to do next

Scan the assets in the inventory using the ServiceNow Agent app.

Related topics

Complete a single scan inventory audit using the ServiceNow Agent app

Complete multi scan inventory audit using the ServiceNow Agent app

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Complete a single scan inventory audit using the ServiceNow Agent app

Scan your inventory assets by using the ServiceNow Agent app for single scan audit records.

Before you begin

The *sn_hamp.migrate_hamaudit* system property is set to **true** to enable the audit enhancements introduced in the Hardware Asset Management version 15.0.0.

Role required: asset, sn_itam_common.asset_audit_admin or sn_itam_common.asset_audit_user

Procedure

1. From your mobile device, launch the ServiceNow Agent application.
2. Tap **Asset**.
3. Select the stockroom or location audit record.
4. Tap **Start audit**.

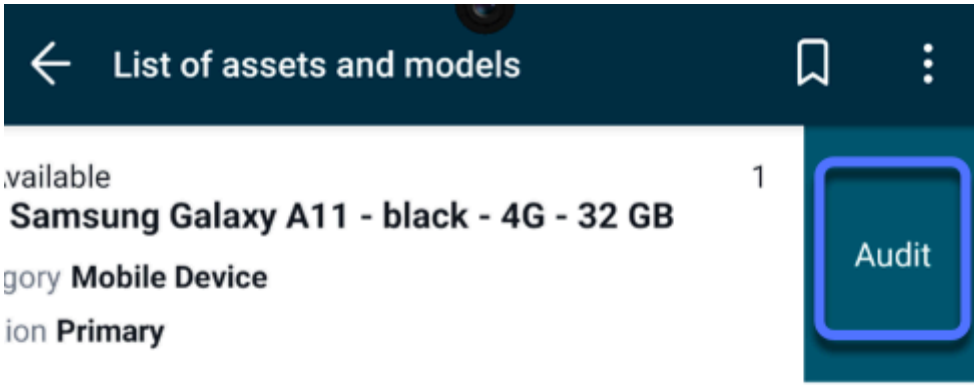
   Note: This button appears only for the location audit.

5. Select **Scan**.
   The Asset scan page is displayed.
6. In the **Asset tag/Serial number/Model barcode** field, enter or scan the asset tag, serial number, or model barcode of the asset.
7. Tap **Next**.
8. **Optional:** Select an **Aisle and space**.
9. Select **Submit**.
   The List of assets and models screen is displayed, showing the scanned asset record.

   Note: When the scanned asset record doesn't exist in your ServiceNow instance, the List of assets and models screen is empty. You can create an asset record for the new asset in the inventory. For more information, see Create an asset from the inventory audit screen.

10. On the List of assets and models screen, slide the scanned asset record to the left side.
    The Audit option is displayed on the screen.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

11. Tap **Audit**.
    The **Details** tab screen is displayed. The audit result field values are automatically updated when you scan the stockroom assets.
12. After you're finished scanning assets, mark the audit as complete.

    a. Tap the three dots icon in the navigation bar.

    b. Tap **Complete**.
    A confirmation message appears on the audits page.

    Note: You can start a new scan as many times as you need while the audit is in progress. After you mark the audit as **Complete**, you can't scan any more assets.

Result

The audit result field values are updated on the **Details** tab screen. For a detailed field description, see Audit results.

What to do next

- Review the inventory audit result.
- Tap the audit result field values to view the detailed list of the assets.

Related topics

View audit results

Create an asset from the inventory audit screen

Complete multi scan inventory audit using the ServiceNow Agent app

Scan your inventory assets by using the ServiceNow Agent app for the multi scan audit records.

Before you begin

Role required: asset, sn_itam_common.asset_audit_admin, or sn_itam_common.asset_audit_user

Note:

- When the *sn_hamp.migrate_hamaudit* system property is set to **true**, you're required to have the asset role, along with either the sn_itam_common.asset_audit_admin or sn_itam_common.asset_audit_user role.
- When the *sn_hamp.migrate_hamaudit* system property is set to **false**, only the asset role is required.

Procedure

1. From your mobile device, launch the ServiceNow Agent application.
2. Tap **Asset**.
3. Select the stockroom or location audit record.
4. Tap **Start audit**.

   Note: This button appears only for the location audit.

5. Select **Scan**.
   The Asset scan screen is displayed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Scan or enter the asset tag in the **Asset Tag** field.
   You can scan or enter the asset tag for one or more assets.
7. **Optional:** Select the **Review** tab to review the list of scanned assets.
   On the review screen, you can delete assets if needed. However, Hardware Asset Management automatically removes duplicates for assets that you accidentally scan twice.
8. Tap **Next**.
9. **Optional:** Select an Aisle and space.
10. Select **Submit**.
    The Stockroom audit **Details** tab screen is displayed.

    Note: If the scanned asset record doesn't exist in your ServiceNow instance, a new asset record is created using the provided Asset tag. The new asset record is created with an unknown product model and an unknown model category value. Additionally, an asset remediation task is also created to notify you that an asset record has been created with an unknown model category and an unknown product model. Open the asset remediation task from the Hardware Asset Workspace and update the **Model category** and **Model** fields value for the asset. For more information, see Close an asset remediation task.

11. After you're finished scanning assets, mark the audit as complete.

    a. Tap the three dots icon in the navigation bar.

    b. Tap **Complete**.
    A confirmation message appears on the audits page.

    Note: You can start a new scan as many times as you need while the audit is in progress. After you mark the audit as **Complete**, you can't scan any more assets.

Related topics

Close an asset remediation task

Close an asset remediation task

View the open asset remediation from the **Inventory** view and close the task after updating the **Model category** and **Model** fields value for the asset.

Before you begin

Role required: asset, and sn_itam_common.asset_audit_admin, or sn_itam_common.asset_audit_user

About this task

A new asset record is created when all of the following are true:

- The audit record's **Scan method** is set to **Multi scan**.
- During asset scanning, a new asset is detected that doesn't exist in the ServiceNow® instance,

For this new asset record, the application can't automatically determine the **Model category** and **Model** field values. These fields are initially set to **Unknown Model Category** and **Unknown Model**. An asset remediation task is then generated to notify you that an asset record has been created with an unknown model category and an unknown product model. In the Hardware Asset Workspace, you can access the open remediation task, update the asset record as required, and then close the remediation task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > *Hardware Asset Workspace* > **Inventory view**.
2. Select the **Overview** tab.
3. In the Important Actions section, in the Open asset remediation tasks tile, select **View records**.
   The Open asset remediation tasks list is displayed.
4. Select the task Number link.
   The Asset remediation form is displayed.
5. In the **Asset** field, select the Open Record icon.
   The asset form is displayed. The default value for the **Model category** and **Model** field is displayed in read-only mode.
6. Select the **Update** button.
7. On the form, fill in the details.

To what type of asset would you like to change

Field	Description
Asset type	Type of the asset.
Model category	Model category that the asset can be associated with.
Model	Model that the asset can be associated with.

8. Select **Update**.
   The updated Model category and Model value are displayed in the respective fields.
9. Open the **Details** tab.
   The Asset remediation task form is displayed.
10. Select the **Close Task** button.
    The closed asset remediation task isn't listed on the Open asset remediation tasks list.

Related topics

Complete multi scan inventory audit using the ServiceNow Agent app

Create an asset from the inventory audit screen

Create an asset record for the scanned asset that doesn't exist in your ServiceNow instance and that is detected when auditing inventory.

Before you begin

Role required: asset, and sn_itam_common.asset_audit_admin, or sn_itam_common.asset_audit_user

About this task

When scanning an asset in the inventory, if a new asset is detected that doesn't exist in your ServiceNow® instance, you can create a record for it. You can add the asset directly from the audit screen in the ServiceNow Agent app.

Note: This procedure applies when you scan assets for a single scan audit record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

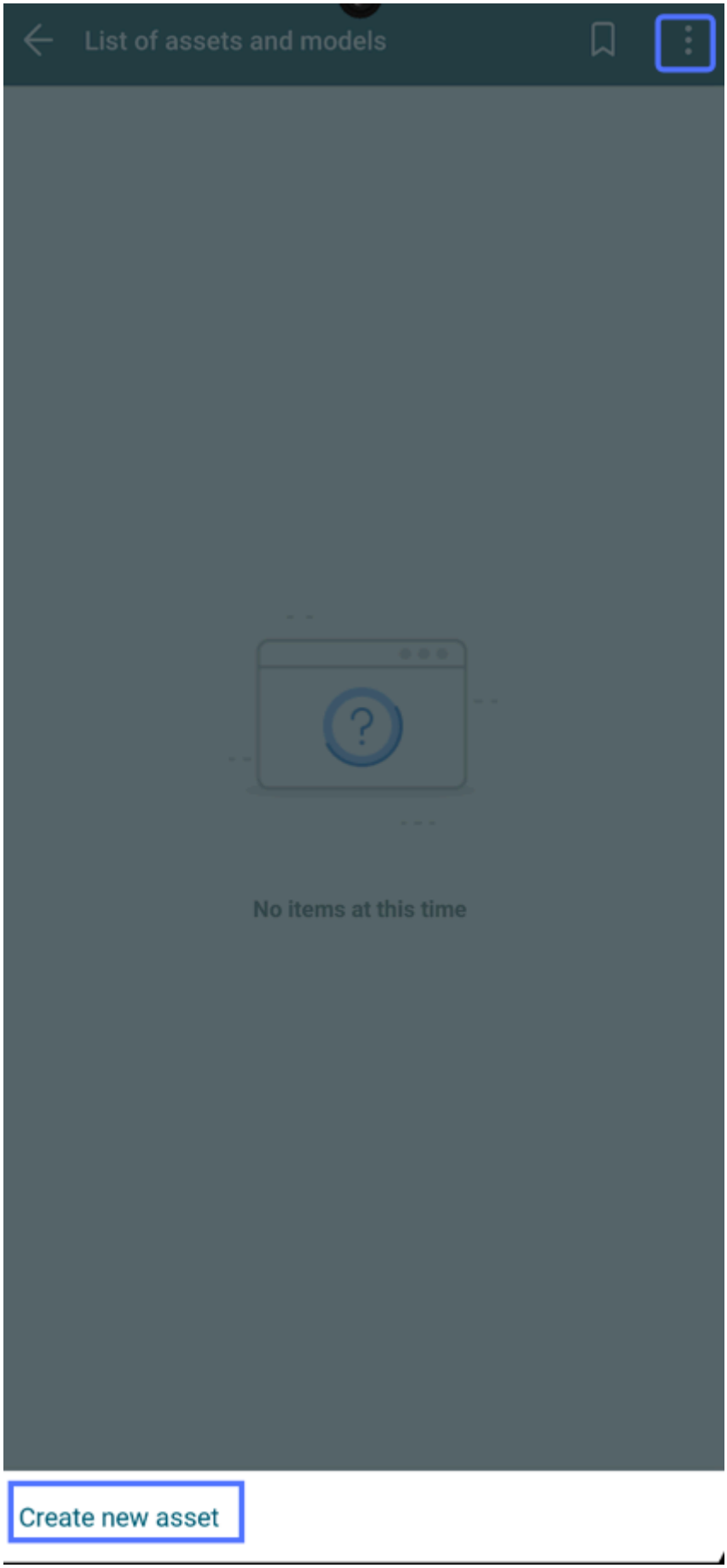
Procedure

1. From your mobile device, launch the ServiceNow Agent application.
2. Tap **Asset**.
3. Select the stockroom or location audit record.
4. Tap **Start audit**.

   Note: This button appears only for the location audit.

5. Select **Scan**.
   The Asset scan page is displayed.
6. In the **Asset tag/Serial number/Model barcode** field, enter or scan the asset tag, serial number, or model barcode of the asset.
7. Tap **Next**.
8. **Optional:** Select an **Aisle and space**.
9. Select **Submit**.
   The List of assets and models screen is displayed.
10. Tap the three dots icon  .
11. Tap **Create new asset**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



The Create asset from audit screen is displayed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

12. On the form, fill in the following fields.

Create asset from audit screen

Model	The product model of the asset.
Stockroom	The stockroom where the asset is available.
State	The **State** field value is automatically set to **In stock**. Change this value as needed.
Substate	The **Substate** field value is automatically set to **Available**. Change this value as needed.
Asset Tag	Alphanumeric information assigned by your organization to help track the asset.
Serial Number	Serial number of this asset.
MAC address	MAC address of the mobile device

Note: Depending on the IRE rule configured for the selected **Model** field value, either **Asset Tag**, **Serial Number**, or **MAC address** field value is required to save the audit record.

For more details on these field descriptions, see Asset record fields.

13. Tap **Submit**.
A confirmation message is displayed on the screen, and the asset record is created.

Result
In the audit results, the **New** field value is incremented for each new asset scanned in the inventory.

View audit results

View the audit results after you audit your inventory. The Audit Results section is activated and shows the details of the audit result.

Before you begin
Role required: admin

About this task
The audit results are generated by matching the assets scanned in the stockroom or physical location with the asset records available in the ServiceNow instance.

Procedure

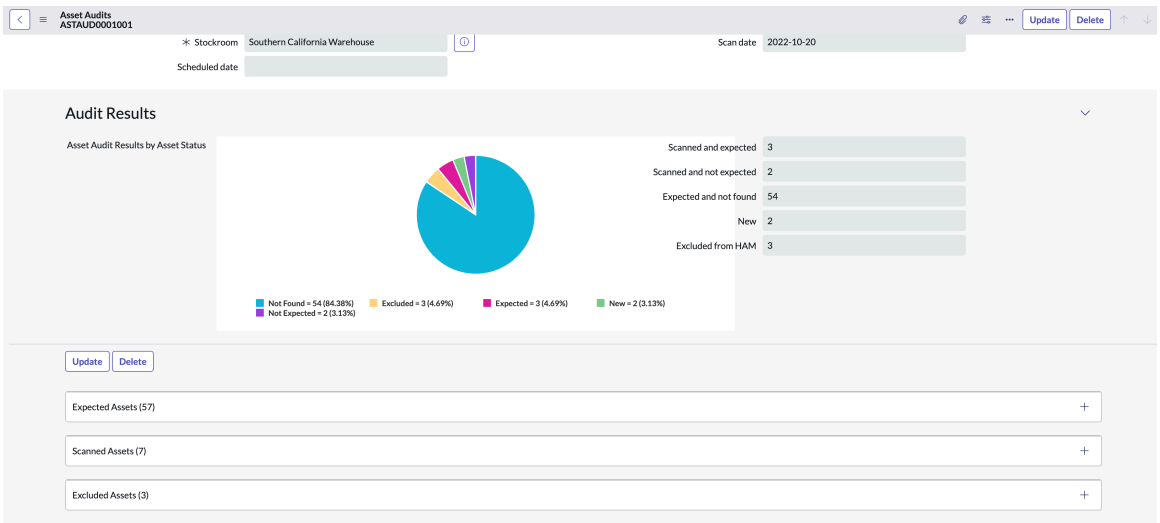
1. Open an asset audit record.

Interface	Action
Core UI	Navigate to **Asset Audits** > **Asset Audits** form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
	Important: If you have set the *sn_hamp.migrate_hamaudit* system property value to **true**, to enable audit enhancements in your ServiceNow® instance, you can't view the audit result from the core UI.
Hardware Asset Workspace	**a.** Navigate to **All** > *Hardware Asset Workspace* > **Inventory view**. **b.** Select the **Asset audit** tab. The **Asset audit** tab displays a list of existing asset audits.
ServiceNow Agent app	**a.** From your mobile device, launch the Mobile Agent application. **b.** Tap **Asset**. **c.** Select Location audits or Stockroom audits tile. The **Open** tab displays a list of existing open asset audits

2. Select the stockroom or location audit number.
The Asset audit results are displayed. For more information about audit result fields, see Audit results.



Note: In the Hardware Asset Workspace, on the Asset audits form under the **Details** tab, the audit result-related field values are populated. In the ServiceNow Agent app, you can find audit results on the Asset Audits screen under the **Details** tab.

Related topics

Audit results

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View deprecated audit records

View the deprecated asset audit records that are created before switching to the common Asset Audits [sn_itam_common_asset_audit] table and stored in the Asset Audits [sn_hamp_asset_audit] table.

Before you begin
Role required: asset

Set the *migrate_hamaudit* system property to **true**.

About this task
You can view deprecated asset audit records in the Audits [Deprecated] list. These records are read only and you can't perform any actions on them or create audit records from this view. Before enabling audit enhancements and migrating to the common audit table, you must complete and close all in-progress and new audit records. Once the *migrate_hamaudit* system property is set to **true**, you can't act on in-progress and new audit records, because they're considered deprecated audits.

Procedure
1. Navigate to **All** > *Hardware Asset Workspace* > **Asset operations**.
2. Select **Audits [Deprecated]**.
3. Select an audit number link.

What to do next
View the details of scanned assets within the asset audit form by selecting the relevant tabs.

View RFID information of assets

View the Radio Frequency Identification (RFID) information of assets to manage and locate important assets easily.

Before you begin
Role required: asset

Procedure

Navigate to a hardware asset for which you want to view the RFID information.

Interface	Action
Core UI	**a.** Navigate to **All** > **Hardware Assets**. **b.** Select an Asset tag for which you want to view the RFID information. **c.** Select the Preview icon (ⓘ) beside the **RFID tag** field in the **General** tab. **d.** Select **Open Record** to view the RFID infor mation of the asset.
Hardware Asset Workspace	**a.** Navigate to **Hardware Asset Workspace** > **Asset estate**. **b.** Select the **Hardware assets** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
	c. Select the display name of a hardware asset for which you want to view the RFID information. **d.** Select the Open Record icon in the **RFID tag** field under the **Details** tab.

Note: The RFID tag field doesn't exist for an excluded asset.

Field	Description
RFID tag	Unique identifier of the RFID tag in the RFID system.
Site name	Name of the site as defined in the RFID system.
Type	Resource type as defined in the RFID system.
Zone group	Zone group as defined in the RFID system.
Serial number	Unique identifier as defined in the RFID system.
Zone group dwell	Length of time the asset has been in the current zone group relative to the timestamp of the data import.
Tag source	The application source of RFID data.
Zone	Zone as defined in the RFID system.
Last blink time	Last time the RFID tag was scanned.
Zone dwell	Duration for which the asset has been in the current zone as compared to the timestamp of the data import.
Last blink elapsed time	Duration for which the asset has been scanned in the RFID system as compared to the timestamp of the data import.
Grid-x, Grid-y, Grid-z	Physical location as defined in the RFID system.
Status	Status of the matching of RFID information to the resource.
Active	Option to map RFID information to the Asset [alm_asset] table. This option is selected by default.

Note:

The activity history is captured only for RFID tag and Zone.

Related topics

Integrating Zebra technology RFID system

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Track asset location using indoor maps

Locate and track the consumables and hardware, bundle, and pallet assets in your organization by using indoor maps. Indoor maps provide an interactive interface that enables you to visualize the location of your assets within your campuses, buildings, floors, and places.

Before you begin

To be able to use indoor maps in Hardware Asset Workspace, make sure you fulfill the following requirements:

- You should explicitly install Indoor Mapping for Assets (com.sn_ima) application from the ServiceNow® Store. When you install this application, Indoor Mapping (sn_map_core) and Indoor Mapping component (sn_map_component) are also installed.

  Note: To be able to view demo data for indoor maps, you must reinstall demo data after you install the Indoor Mapping for Assets application. For more information, see Add or repair demo data for applications and plugins.

- Set the *com.sn_ham.indoormap.enabled* asset parameter to **true** on your ServiceNow instance.
- Set up your indoor maps: You can design indoor maps using Map Studio. For more information, see Configure Indoor Mapping.

  Note: When you install indoor maps using the entitlement to the Hardware Asset Management license, you can use only the PNG floor map files in the Map Studio. You can't import the files that are in AutoCAD or Raster file format. To use AutoCAD or Raster files, you should have entitlement to Workplace Service Delivery.

- Synchronize location data: The Hardware Asset Management application supports the following indoor mapping location types:
  - Campus: Represents a set of buildings within the same geographic location.
  - Building: Represents a multi-floor building within a specific campus.
  - Floor: Represents a floor within a specific building.
  - Place: Represents either a polygon or point of interest within a specific floor. Places can represent areas, rooms, desks, printers, assets, and more.

  Note: For indoor map to show assets in Hardware Asset Workspace, assets should be assigned to a location of the type **place** or **room** in the Location [cmn_location] table.

  To view the newly created locations within the Hardware Asset Management application, make sure to synchronize the newly created locations from Map Studio to the Location [cmn_location] table.

  You can associate the locations created in Map Studio with pre-existing records or new records in the Location [cmn_location] table. For more information, see Synchronize Indoor Mapping map data with CMN location.

Role required: admin or asset

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset estate**.
2. Select the **Asset indoor map** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. View the assets on a selected floor by using the **Campuses**, **Buildings**, and **Floors** filters.
4. **Optional:** Select a display option at the bottom-right corner of the Indoor map page to view the assets and their location on the selected floor in a particular format.
   - To show the location of the assets on an interactive map, select **Show map only**.
   - To display both the interactive map and a list view of the assets, select **Show map and list**.
   - To display only a list view of the assets, select **Show list only**.
5. **Optional:** If you're viewing the interactive map, view the list of assets in a selected location on the floor by selecting a location on the map.
6. **Optional:** View the location of assets based on a department, user, or model category or a combination of these values.
   a. Select the Filters Tab icon on the contextual sidebar of the map.
   b. Select the values for the **Department**, **User**, or **Model category** filters in the Filter by dialog box.

Manage your inventory through pallet assets

Manage your inventory effectively using pallet assets.

Create pallet assets

Create a pallet asset from the Asset estate view in the Hardware Asset Workspace to track and manage assets in the inventory.

Before you begin

You must create a model for a pallet asset. For more information, see Models.

Role required: asset

About this task

While creating a pallet asset, only the Details, Disposal, Activities, and Audit sections of the asset form appear. Although audit-related fields are shown on the asset form, you can't conduct the audit of pallet assets. You can specify the aisle and space details to give the exact location of the pallet in a stockroom.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset estate**.
2. Select **New Asset**.
3. In the dialog box, select **Pallet** as the asset type and then select **Create**.
4. On the form, fill in the fields.

Pallet Asset Details section

Fields	Description
Display name	Name of the pallet asset based on the values in the **Asset Tag** and **Model** fields set when the pallet asset is created. For example, the display name for a pallet with an Asset tag of PAL0000001 whose Model is 3Com Wooden pallet would be PAL0000001 - 3Com Wooden pallet.
Model category	The model grouping of the pallet asset. This field is read-only and is automatically set to Pallet.
Number	Unique, auto-generated number for the pallet asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Fields	Description
Model	Product model of the pallet asset.
Quantity	Number of items the pallet asset represents. This field is automatically set to 1.
Asset tag	Alphanumeric tracking information from the tag attached to the pallet asset.
Pallet type	Type of pallet. The available values are: ○ Pallet ○ Bin ○ Box ○ Container ○ other
State	Current state of the pallet asset. The available values are: ○ In stock ○ In transit ○ Retired ○ Missing
Substate	Current substate of the asset, such as Available or Reserved. The values in the Substate list change based on what you select from the State list.
Stockroom	Name of the stockroom.
Reserved for	Name of the person for whom the pallet is reserved.
Aisle	Aisle details of the pallet within the stockroom. This field appears only when In stock or Build is selected from the **State** field.
Location	Physical location of the stockroom.
Space	Space details of the pallet within the aisle. This field appears only when In stock or Build is selected from the **State** field.
Parent	Parent asset of the pallet asset.
Comments	Optional additional information.

Disposal section

Fields	Description
Disposal order number	This field is automatically set to the unique number assigned to the asset disposal order. **Note:** This field appears only if you have installed Hardware Asset Management from the ServiceNow Store.
Scheduled retirement	Scheduled date on which the asset retires.
Disposal vendor	The vendor assigned to carry out the asset disposal order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Fields	Description
	Note: This field appears only if you have installed Hardware Asset Management from the ServiceNow Store.
Retire date	Actual date on which the asset retires.
Vendor disposal order ID	Order number from the vendor assigned to carry out the asset disposal order. **Note:** This field appears only if you have installed Hardware Asset Management from the ServiceNow Store.
Refresh request line	Refresh request line number if the asset has been identified as an aged asset by the Hardware Asset Refresh flow.
Disposal date	Date when the asset disposal process is completed. **Note:** This field appears only if you have installed Hardware Asset Management from the ServiceNow Store.
Beneficiary	Organization that will receive the asset when the asset is retired.
Resale price	Value of the asset when it's retired. For example, if the asset is donated, the value used when reporting taxes.

Activities section

Field	Description
Work notes	Any additional information about the asset. Work notes are updated automatically in the following situations: ○ Updates to **State**, **Substate**,or **Reserved for** fields of the asset record. Any updates to these fields are automatically recorded in the **Work notes** field. ○ When the asset is received by a transfer order. These work notes help in tracking the life cycle of an asset.

5. Select **Save**.

Result
The pallet that you created is added to the list shown in the Pallets tab.

Add assets to a pallet

Add base, hardware, bundle, consumable, and other pallet assets to an in-stock pallet to track and manage the assets in a stockroom as a group.

Before you begin
Role required: asset

About this task
You can add assets to a pallet only under the following conditions:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The asset belongs to the same stockroom as the pallet or has no value set in the **Stockroom** field.
- The pallet **State** field value is In stock.
- The asset **State** field value is one of the following:
  - On order
  - In stock
  - In transit
  - Retired
- The asset isn't associated to another parent asset.

  Either remove the existing parent-child association and then add the asset to the pallet or directly add the pallet as parent to the asset.

When an asset that is a parent to other assets is added to a pallet, all its child assets are also added. However, the parent field of the child assets isn't replaced with details of the pallet.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset estate**.
2. Select the **Pallets** tab.
3. Select the pallet to which you want to add assets.
4. Select the **Assets** tab.
5. Add base, hardware, and bundle assets to the pallet.

   a. Select **Add assets**.

   b. In the Add assets dialog box, select the assets that you want to add.
   You can use the filter to narrow the list of available assets.

   c. Select **Add**.

   The assets that you added to the pallet are added to the list shown in the Assets tab. The state, substate, location, stockroom, aisle, and space details of the assets are synced with the pallet.

   Note: Only the substate of pre-allocated assets isn't synced with the pallet. For more information, see Create pre-allocated assets.

6. Add consumable assets to the pallet.

   a. Select **Add consumables**.

   b. In the Add consumable to pallet dialog box, select the consumable from the list of available consumables or search for it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. In the **Quantity** field, either accept the default field value of the maximum available quantity of the selected consumable or modify the value to the number of consumables you want to add.

d. Select **Add**.

The consumable asset that you added to the pallet is added to the list shown in the Assets tab.

Remove assets from a pallet

Remove the assets contained in a pallet when you don't need to track and manage them using pallets.

Before you begin

Role required: asset

About this task

Removing the assets from a pallet breaks the parent-child association between them.

You can remove assets only from a pallet whose **State** field value is In stock.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset estate**.
2. Select the **Pallets** tab.
3. Select the pallet from which you want to remove assets.
4. In the Pallet Details form, select the **Assets** tab.
5. Select the assets that you want to remove from the pallet and select **Remove**.

Result

The assets that you removed from the pallet are no longer shown under the Assets tab.

Delete pallet assets

Delete a pallet asset when no assets are associated with it.

Before you begin

Role required: asset

About this task

You can delete a pallet only if it’s empty. Remove any assets before trying to delete the pallet.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset estate**.
2. Select the **Pallets** tab.
3. Select the pallet that you want to delete.
4. Select the more actions icon ••• next to the **Save** button and select **Delete**.

Result

The pallet that you deleted is no longer shown under the Pallets tab.

Using pallet assets for managing inventory

You can add a pallet with the assets contained in it to transfer orders and disposal orders to manage your inventory effectively.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Moving pallets from one stockroom to another

Move an in-stock pallet along with the assets contained in it from one stockroom to another by using transfer orders. When you move only the assets contained in a pallet, the assets are removed from the pallet after the Ready for fulfillment task is closed. You can also use a transfer order to move an empty pallet.

Updates that you perform on the pallet as part of the transfer order workflow are applicable to the assets contained in it.

If there's a problem with all or some of the assets you receive as part of a transfer order, you can return the pallet along with its assets. You can't return individual assets contained in the pallet.

For more information, see Transfer assets using transfer orders.

Disposing of pallets

Dispose of a pallet with its assets that are reaching the end of the life cycle or that aren't functional by using a disposal order. When you add a pallet to a disposal order, the assets and child assets in the pallet are also added. However, any asset bundles in the pallet are not included.

The disposal order workflow when disposing of a pallet or its assets is as follows:

- Disposing of the pallet with the assets contained it: The verified pallet and its assets are disposed.
- Disposing of only the assets and retaining the pallet: The assets are removed from the pallet after they're verified.
- Disposing of the pallet with only some of its assets and retaining the remaining assets: The assets that weren't verified or disposed of are removed from the pallet automatically.

For more information, see Create a disposal order.

Consuming assets from a pallet

Note: When an asset from the pallet is consumed as part of any workflow, the asset is automatically removed from the pallet.

Assets contained in a pallet can also be consumed as part of the following workflows:

- Return Merchandise Autorization (RMA): When an asset from a pallet is added to RMA, the asset is immediately removed from the pallet.

  Note: In an RMA request with an off-site replacement or repair, the assets that are in the pallet aren't shown in the Replacement asset field on the Receive task form.

- Asset Local Stock: When an asset from the pallet is consumed as part of the local stock, the asset is removed from the pallet after the Confirm assigned asset task is closed.
- Loaner: When an asset from a pallet is consumed as a Loaner asset, the asset is removed from the pallet after the Prepare task of the loaner order is closed.
- Return leased assets: When a leased asset from a pallet is returned, the asset is removed from the pallet after the Shipment task is closed.
- Swap and deploy tasks from ITSM: When deploy asset action is triggered from ITSM, the asset that must be deployed is removed from the pallet. When swap action is triggered from ITSM, the asset in the pallet that is a replacement for a faulty asset is removed from the pallet.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View stockroom details

View detailed information about the stockrooms where your hardware, consumables, bundles, pallets, loaner, enterprise, and other assets are located.

Before you begin

Role required: admin or asset

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of available stockrooms, select the stockroom.
4. View details about the stockroom on the Details tab.
   View the following details about the stockroom:
   - All open tasks associated with the stockroom through the Open stockroom task cards. Selecting a card displays a list of the task records.
   - The active stock rules of your stockroom. The stock rule cards from the contextual sidebar help you know if the stock is less than the threshold and if the model has reached the end of sale.
   - The hours that the stockroom is available are shown in the **Hours of operation** field.
   - The location of the stockroom based on the specified address is shown in the interactive map. To view all service locations and distribution channels associated with the stockroom, select **Toggle full screen view**.
   - Options to enable AI agents in the Help manage hardware asset requests agentic workflow to source hardware assets requests autonomously are available in the Sourcing by AI agents section. The auto-sourcing options include the following:
     - **Auto-consume**
     - **Auto-transfer**
     - **Auto-purchase**

     For more details, see Configure a stockroom for automated sourcing by AI agents and ServiceNow Otto for Hardware Asset Management (HAM) AI agent collection Help manage hardware asset requests agentic workflow.
5. On the Task timeline tab, view the timeline of all scheduled stockroom tasks and the inbound shipments, outbound shipments, and work activities associated with those tasks.
6. **Optional:** On the **Task timeline** tab, adjust the timeline view and timeline duration.
   - Set the view to the calendar view with a specified time duration by selecting one of the following values from the **Calendar** drop-down list in the top right:
     - **Day**
     - **Work week**
     - **Week**
     - **Month**
   - Set the view to the timeline view with a specified time duration by selecting one of the following values from the **Timeline** drop-down list in the top right:
     - **Day**
     - **Week**
     - **4 Weeks**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. View the service locations and distribution channels of the stockroom and details of different types of assets in the stockroom by selecting the tabs corresponding to the asset type.

   Note: The tabs related to the enterprise assets appear only if the Enterprise Asset Management application is installed on your ServiceNow® instance. If you select an enterprise asset, you're automatically redirected to the corresponding record in the Enterprise Asset Workspace. If you have access to an enterprise asset, you also have access to the Enterprise Asset Workspace. For more details, see Enterprise Asset Workspace.

Repair and maintenance

Manage hardware asset repairs, lifecycle templates, and warranty information to keep operational and maintenance records of the assets up to date.

Perform these tasks as needed to manage hardware asset repair and maintenance operations in HAM.

Task details

Task	Description
Repair defective assets in your stockroom	Initiate and manage repair workflows for defective hardware assets directly from the Hardware Asset Workspace.
Manage lifecyle of hardware models	Create and manage calculated lifecycle templates to standardize maintenance and refresh schedules across hardware asset models.
Receive asset warranty details from Lenovo	Retrieve and sync warranty information for Lenovo hardware assets directly from the Lenovo Warranty API.

Manage repair of defective assets in your stockroom in the Hardware Asset Workspace

Optimize your inventory by getting the defective hardware assets in your stockroom repaired using the Repair flow.

In the Repair flow, an asset manager requests the repair of defective assets in the stockroom. An asset technician troubleshoots, repairs, and evaluates the asset. The evaluated asset is either put to use or disposed of. For details on stages in the Repair flow, see Repair flow to fix defective hardware assets within a stockroom.

Request repair of defective hardware assets in your stockroom

As an asset manager, you can get the defective hardware assets in your stockroom repaired by creating repair orders.

You can request repair of defective hardware assets through any of the following options:

- Request repair of hardware assets using Service Catalog
- Create repair orders for hardware assets in the Inventory view
- Request repair of a hardware asset using the Repair option

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

Consider the following points when you create a repair order:

- You can't request repair of the following assets:
  - Consumables
  - Assets that are part of any other workflow
- You can request repair of a child asset only if you have added its parent asset to the repair order. However, assets in the pallets can be repaired.

Request repair of hardware assets using Service Catalog

Submit a Service Catalog request to repair hardware assets that are defective or pending repair in your stockroom.

Before you begin

Role required: asset

About this task

You can request repair of multiple defective hardware assets in your stockroom using a single catalog request.

Procedure

1. Navigate to **All** > **Service catalog** > **Asset Lifecycle** > **Asset Repair**.
2. On the form, fill in the fields.

Request for stockroom repair of an asset form

Field	Description
Due Date	Date by which you want the defective assets to be repaired.
Stockroom	Stockroom that has assets to be repaired.

3. Select assets to be repaired.
   a. Select the Edit Asset(s) icon ( ).
   b. Select the assets from the list.
   You can add one or more assets to the request.
   c. Select the Lock icon .
4. Select **Submit**.

Result

- Your repair request is submitted successfully.
- A repair order is created in the **Draft** stage.
- Each asset in the repair order is associated with a repair order line that is in the **Troubleshoot** stage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create repair orders for hardware assets in the Inventory view

Request repair of hardware assets that are defective or pending repair by creating a repair order in the Inventory view of the Hardware Asset Workspace.

Before you begin

Role required: asset

About this task

When you create a repair order from the Inventory view, you must explicitly create a repair order line for the asset that you want to get repaired.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Create a Repair order.
   a. Select **New**.
   b. On the form, fill in the fields.

      Note: The following fields are optional:
      - **Assignment group**
      - **Assigned to**
      - **Due date**
      - **Work note**

      Create New Repair order form

Field	Description
Stockroom	Stockroom that has assets to be repaired. This field is required.
Assignment group	Assignment group to which you want to assign the repair order.
Assigned to	Person from the assignment group who is primarily responsible for the Repair order.
Due date	Date by which the defective hardware assets should be repaired.
Work notes	Notes about the repair order.

   c. Select **Save**.
      - A repair order that's in the **Draft** stage is created.
      - The **Repair order lines** tab is displayed next to the **Details** tab of the repair order.
4. Add repair order lines to the repair order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select the **Repair order lines** tab.

b. Select **Add**.

c. In the **Add assets** dialog box, select the assets and then select **Add**.

Note: You can add child assets of a pallet asset to the repair order. The asset that you added to the repair order is removed from the pallet automatically.

For each asset that you added, a repair order line that's in the **Troubleshoot** stage is created.

5. Select **Save**.

Request repair of a hardware asset using the Repair option

Request repair of a defective hardware asset in your stockroom directly through an option on the asset form.

Before you begin

Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset Estate**.
2. Select the **All assets** tab.
3. Select an asset with State as **In stock** and Substate as **Defective** or **Pending repair**.
4. Select the More Options icon ••• on the asset form.
5. Select **Repair**.

Result

A repair order with a repair order line in the **Troubleshoot** stage is created.

Repair order fulfillment in the Hardware Asset Workspace

Repair order fulfillment tracks the resolution of defective and out-of-warranty hardware assets. Repair asset tasks associated with each repair order line must be completed before an order is fulfilled. Orders can be completed manually or through the Help repair hardware assets agentic workflow.

ServiceNow Otto for Hardware Asset Management (HAM) AI agent collection Help repair hardware assets agentic workflow

Use the Help repair hardware assets agentic workflow, driven by AI agents, to handle the repair requests of defective and out-of-warranty hardware assets automatically. These AI agents validate the repair tasks, provide detailed troubleshooting and repair steps, and finally close the relevant tasks after receiving user confirmation.

Help repair hardware assets agentic workflow overview

Important: This agentic workflow is turned on by default. For more information, see AI agents, skills, and agentic workflows on by default.

The AI agents in the Help repair hardware assets agentic workflow offers these benefits:

- AI-guided troubleshooting and repair steps help improve accuracy and consistency
- End-to-end task automation helps reduce delays in resolving hardware issues

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Prerequisites to use the Help repair hardware assets agentic workflow

- Your organization must have an IT asset management system integrated with AI-driven repair workflows.
- AI agents must have access to repair order records and the web.
- Repair task numbers are required to initiate requests.
- Users must have the inventory_user role.

Actors in the Help repair hardware assets agentic workflow

- Asset manager: Reports hardware issues by submitting repair requests.
- Inventory user: Works on assigned troubleshooting and repair tasks.
- AI agents: Provide detailed troubleshooting and repair steps through web-based search and complete the relevant tasks.

Stages in the agentic workflow

The repair of defective or out-of-warranty hardware assets through the agentic workflow includes the following stages:

1. Repair order creation by an Asset manager
   a. Initiates the repair process for defective or out-of-warranty hardware assets in the stockroom by creating a repair order.
   b. Adds one or more repair order lines to the repair order, depending on the number of assets that must be fixed, and saves the repair order.

      Result: A Troubleshoot task is created for each repair order line.

   c. Assigns a technician for the troubleshooting task, automatically triggering the Help repair hardware assets agentic workflow.

      Note: The assigned technician with the inventory_user role can log in and view the active conversation with the AI agents in the ServiceNow Otto panel in the Hardware Asset Workspace by selecting the Otto icon  .

      To access the panel after it has been activated, you should have the now_assist_panel_user role.

2. Repair order task validation by the AI agent
   a. The Asset next best action AI agent retrieves the task details and validates them.
   b. Based on the validation result, one of the following events occurs:
      - If the task number is invalid or the task isn't active, the agentic workflow ends.
      - If the task is valid, the AI agent checks whether it's a troubleshooting task, or a repair task and triggers the appropriate AI agent to handle it.
3. Processing of tasks by AI agents

   #### Handling of the troubleshooting task by the Evaluate asset AI agent

   The Evaluate asset AI agent manages the troubleshooting task as follows:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Searches the web to find a detailed evaluation guide that matches the model and manufacturer of the asset.

   If the model or manufacturer details aren't present on the asset record, the agentic workflow stops.

   > **Important:** Web searches using third-party large language models (LLMs) like Gemini won't be supported for Federal customers.

b. Displays the evaluation guide in the panel, to help the technician to identify the issue with the asset.

c. Checks with the technician to confirm whether the troubleshooting steps were helpful.

   - If the technician confirms that the troubleshooting steps helped, the AI agent performs these steps:

     i. Asks the technician to confirm the troubleshoot result (**Repairable**, **Unrepairable**, or **Redeployable**) and provide the issue details.

     ii. Updates the task with the details provided by the technician and closes the task.

   - If the technician confirms that the troubleshooting steps didn't help, the AI agent performs these steps:

     i. Requests more details about the issue to refine the web search.

     ii. Searches the web again to find a detailed evaluation guide that matches with the details provided.

     iii. Displays the evaluation guide in the panel, to assist the technician in identifying the issue.

     iv. Checks with the technician to confirm whether the new troubleshooting steps were helpful.

       - If the technician confirms that the new troubleshooting steps were helpful, the AI agent updates the task with the troubleshooting result and the issue details provided by the technician, and then closes the task.

       - If the technician confirms that the new troubleshooting steps weren't helpful, the agentic workflow stops.

When a troubleshoot asset task is marked as Repairable and closed, the following events occur:

a. A repair task is automatically generated and assigned to the technician who handled the troubleshoot task. This action also initiates the Help repair hardware assets agentic workflow.

b. The Asset next best action AI agent fetches the details of the repair task and performs a validation check.

c. Depending on the validation result, one of these events occurs:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If the task number is invalid or the task isn't active, the agentic workflow ends.
- If the task is valid, the AI agent confirms the task type and triggers the Repair asset AI agent to manage the repair process.

Handling of the repair task by the Repair asset AI agent

The Repair asset AI agent checks if the issue is identified and present on the repair task.

- If the issue is present on the repair task, the AI agent performs the following actions:

  a. Searches the web to find detailed repair steps to resolve the issue identified on the asset.

  > **Note:** If the model or manufacturer details aren't present on the asset record, the agentic workflow stops.

  b. Displays the repair instructions in the panel, to help the technician to fix the asset issue.

  c. Checks with the technician to confirm whether the repair steps were helpful.

  - If the technician confirms that the repair steps were helpful, the AI agent performs these steps:

    i. Asks the technician to confirm the repair result (**Repaired**, **Unrepairable**, or **Redeployable**) and provide the issue details.

    ii. Updates the repair task with the repair result and the issue details provided by the technician, and closes the task.

  - If the technician confirms that the repair steps weren't helpful, the AI agent performs these steps:

    i. Requests more details about the issue to refine the web search.

    ii. Searches the web again to find repair steps that match with the details provided.

    iii. Displays the repair steps in the panel, to assist the technician in resolving the issue.

    iv. Checks with the technician to confirm whether the new repair steps were helpful.

    - If the technician confirms that the new repair steps were helpful, the AI agent updates the task with the details provided by the technician and closes the task.
    - If the technician confirms that the new repair steps were not helpful, the agentic workflow stops.

- If the issue isn't present on the repair task, the AI agent performs the following actions:

  a. Requests more details about the issue to refine the web search.

  b. Searches the web again to find repair steps that match with the details provided.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Displays the repair steps in the panel, to assist the technician in resolving the issue.

d. Checks with the technician to confirm whether the new repair steps were helpful.

- If the technician confirms that the new repair steps were helpful, the AI agent updates the task with the details provided by the technician, and then closes the task.
- If the technician confirms that the new repair steps weren't helpful, the agentic workflow stops.

Role masking

Roles required:

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

AI agents used in the Help repair hardware assets agentic workflow

The Help repair hardware assets agentic workflow uses specific AI agents to validate repair tasks, handle troubleshooting and repair tasks, and complete the tasks autonomously.

Role of AI agents in the Help repair hardware assets agentic workflow

AI agent	AI agent role
Asset next best action AI agent	Validates the repair tasks, checks the task type, and triggers the Evaluate asset AI agent to manage the troubleshooting task or the Repair asset AI agent to manage the repair task.
Evaluate asset AI agent	Performs a web search and provides a detailed evaluation guide to help the technician identify the issue on the asset. Updates the troubleshooting task with the details received from the technician and then closes the task.
Repair asset AI agent	Performs a web search and provides detailed repair steps to help the technician resolve the issue identified on the asset. Updates the repair task with the details received from the technician and then closes the task.

Fulfill repair orders in the Hardware Asset Workspace

Fulfill a repair order by completing all the open repair asset tasks associated with its repair order lines.

A repair order can have one or more repair order lines depending on the number of assets to be repaired through that repair order. A repair order is fulfilled only when all its repair order lines are completed.

As a technician, you must complete the following tasks associated with each repair order line to fulfill a repair order:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Troubleshoot asset
2. Repair asset
3. Evaluate asset

You can also work on the asset repair tasks assigned to you by using the Mobile Agent application. For details, see Manage hardware asset repair tasks using the Mobile Agent application.

View open repair orders for your stockroom in the Hardware Asset Workspace

View open repair orders for your stockroom to get the details of the repair order lines and repair tasks that need action.

Before you begin
Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom.
   In the Open stockroom tasks section, the **Open repair orders** card displays the number of open repair orders.
4. Select the **Open repair orders** card.

Result
The list of open repair orders for the stockroom is displayed.

Troubleshoot assets requested for repair in the Hardware Asset Workspace

Complete the troubleshooting task to assess the issues with the defective asset. Based on your observations, you can confirm whether the asset can be repaired, redeployed, or should be disposed of.

Before you begin
Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select a repair order that's in the Draft or In Progress stage.
4. Select the **Repair order lines** tab.
5. Select a repair order line that's in the Troubleshoot stage and Open state.
6. Select the **Repair asset tasks** tab.
7. Select the **Troubleshoot asset** task that's in the Open state.
8. Indicate that you have started working on the Troubleshoot task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. **Optional:** Record the time worked on the task.
   You can either use the timer or record the time manually. For more details, see Record time worked on asset repair tasks in the Hardware Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

An entry for the time you worked is created in the **Time Worked** tab of the Troubleshoot asset task.

10. Select the **Details** tab.
11. Select the troubleshooting result in the **Troubleshoot result** field.
    - If the asset is repairable, select **Repairable**.
    - If the asset is unrepairable, select **Unrepairable**.
    - If the asset can be redeployed, select **Redeployable**.
12. **Optional:** Enter the issue identified with the asset during the repair process in the **Issue identified** field.
    Once the task is closed, this field can't be modified.
    The value in the **Issue identified** field is carried forward to the repair asset task after the troubleshooting task is closed.
13. Enter notes related to the task in the **Work notes** field.
14. Select **Close task**.

Result

- If you had set the Troubleshooting result to **Unrepairable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and substate changes to Pending disposal.
- If you had set the Troubleshooting result to **Redeployable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Available.
- If you had set the Troubleshooting result to **Repairable**, the following changes happen on closure of the task:
  1. The stage of the repair order line changes to Repair.
  2. The state of the asset changes to In stock and the substate changes to Pending repair.
  3. Repair asset task is created.

What to do next

Complete the repair asset task in the Hardware Asset Workspace.

Complete the repair asset task in the Hardware Asset Workspace

Complete the repair of the defective asset and confirm if the asset is repaired, unrepairable, or redeployable.

Before you begin

Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order for which you want to complete the Repair asset task.
4. Select the **Repair order lines** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select the repair order line that's in the Repair stage.
6. Select the **Repair asset tasks** tab.
7. Select the **Repair asset** task that's in the Open state.
8. Indicate that you have started working on the Repair asset task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. **Optional:** Record the time worked on the task.
   You can either use the timer or record the time manually. For more details, see Record time worked on asset repair tasks in the Hardware Asset Workspace.
   An entry for the time you worked is created in the **Time Worked** tab of the Repair asset task.
10. Select the **Details** tab.
11. Select the repair result in the **Repair result** field.
    - If the asset is repaired, select **Repaired**.
    - If the asset couldn't be repaired, select **Unrepairable**.
    - If the asset can be redeployed, select **Redeployable**.
12. **Optional:** Enter the issue identified with the asset during the repair process in the **Issue identified** field.

    (Optional) This field is automatically populated with the value carried forward from the troubleshoot asset task if the issue is identified and a value is provided in the **Issue identified** field. Once the task is closed, this field can’t be modified.

    The value in the **Issue identified** field is carried forward to evaluate repaired asset task after the repair task is closed.
13. Enter notes related to the task in the **Work notes** field.
14. Select **Close task**.

Result

- If you had set the Repair result to **Unrepairable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Pending disposal.
- If you had set the Repair result to **Redeployable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Available.
- If you had set the Repair result to **Repairable**, the following changes happen on closure of the task:
  1. The stage of the repair order line changes to Evaluate.
  2. The state of the asset changes to In stock and the substate changes to Pending evaluation.
  3. Evaluate asset task is created.

What to do next

Evaluate the repaired asset in the Hardware Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Evaluate the repaired asset in the Hardware Asset Workspace

Evaluate the repaired asset and confirm if the asset is redeployable or should be disposed of. The Repair flow completes after the repaired asset is evaluated.

Before you begin

Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order for which you want to evaluate the repaired asset.
4. Select the **Repair order lines** tab.
5. Select a repair order line that's in the Evaluate stage and Open state.
6. Select the **Repair asset tasks** tab.
7. Select the **Evaluate asset** task that's in the Open state.
8. Indicate that you have started working on the Evaluate asset task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. **Optional:** Record the time worked on the task.
   You can either use the timer or record the time manually. For more details, see Record time worked on asset repair tasks in the Hardware Asset Workspace.
   An entry for the time you worked is created in the **Time Worked** tab of the Evaluate asset task.
10. Select the **Details** tab.
11. Select the evaluation result in the **Evaluation result** field.
    - If the asset is repaired and redeployable, select **Redeployable**.
    - If the asset can't be used and should be disposed of, select **To be disposed**.
12. **Optional:** Enter the issue identified with the asset during the repair process in the **Issue identified** field.
    This field is automatically populated with the value carried forward from the repair asset task if the issue is identified and a value is provided in the **Issue identified** field. Once the task is closed, this field can’t be modified.
13. Enter notes related to the task in the **Work notes** field.
14. Select **Close task**.

Result

- If you had set the Evaluation result to **To be disposed**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Pending disposal.
- If you had set the Evaluation result to **Redeployable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Available.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Bulk close asset repair tasks in the Hardware Asset Workspace

Complete and close multiple repair tasks at one go to process a repair order with multiple repair order lines.

Before you begin

Role required: asset

About this task

You can bulk close only similar asset repair tasks that are in the Open state. However, you can't bulk close similar repair tasks for which the task result isn't the same. For example, you can't bulk close two Troubleshoot assets tasks, when one task has a repairable asset and the other has an unrepairable asset.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select a repair order with multiple open repair order lines for which you want to complete the asset repair tasks.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you want to complete.
6. Select the repair task that you want to close.
7. On the Details form, select the task result.
   - If you're completing a Troubleshoot asset task, then select any of the following results in the **Troubleshoot result** field:
     - **Repairable**
     - **Unrepairable**
     - **Redeployable**
   - If you're completing a Repair asset task, then select any of the following results in the **Repair result** field:
     - **Repaired**
     - **Unrepairable**
     - **Redeployable**
   - If you're completing an Evaluate asset task, then select any of the following results in the **Evaluation result** field:
     - **Redeployable**
     - **To be disposed**
8. Enter notes related to the task in the **Work notes** field.
9. Select **Save**.
10. Select **Bulk Close**.
    The **Select Assets** dialog box with similar repair tasks is displayed.
11. Select the tasks that you want to close and select **Close Task**.

Result

All the selected repair tasks are closed with the same task result and Work notes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cancel a repair order in the Hardware Asset Workspace

Cancel a repair order that no longer needs to be fulfilled.

Before you begin
Role required: asset

Procedure
1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select a repair order that's in the Draft or In Progress stage.
4. Select **Cancel**.

Result
- The stage of the repair order changes to Cancelled and the state changes to Closed Incomplete.
- The stage and state of the repair order lines that weren't completed change to Cancelled and Closed Incomplete.

Cancel a repair order line in the Hardware Asset Workspace

Cancel a repair order line that no longer needs to be fulfilled.

Before you begin
Role required: asset

About this task
You can only cancel a repair order line that is not in the Completed stage.

Procedure
1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select a repair order that's in the Draft or In Progress stage.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you want to cancel.
6. Select **Cancel**.

Result
- The stage of the repair order line changes to Cancelled and the state changes to Closed Incomplete.
- The state of the associated repair asset tasks that were open changes to Closed Incomplete.
- The stage of the repair order changes to Cancelled only if there aren't any other repair order lines that are in the Troubleshoot, Repair, Evaluate, or Completed stage.

Record time worked on asset repair tasks in the Hardware Asset Workspace

Manage and record time worked on Troubleshoot asset, Repair asset, and Evaluate asset tasks in the Hardware Asset Workspace. After you start work on a repair asset task, you can pause and resume work. You can also record the time worked manually.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Record time worked on a repair task automatically in the Hardware Asset Workspace

Record the time that you took to complete a repair task without taking any break until you completed the task.

Before you begin
Role required: asset

About this task
You can record the time worked for Troubleshoot asset, Repair asset, and Evaluate asset tasks that are in the Open state.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order that you're working on.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you're working on.
6. Select the **Repair asset tasks** tab.
7. Select the asset repair task for which you want to record the time worked.
8. Indicate that you started work on the task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. Select **Start Timer**.
10. After you have completed working on the task, on the Details form, select the task result.
    - If you have completed a Troubleshoot asset task, then select any of the following results in the **Troubleshoot result** field:
      - **Repairable**
      - **Unrepairable**
      - **Redeployable**
    - If you have completed a Repair asset task, then select any of the following results in the **Repair result** field:
      - **Repaired**
      - **Unrepairable**
      - **Redeployable**
    - If you have completed an Evaluate asset task, then select any of the following results in the **Evaluation result** field:
      - **Redeployable**
      - **To be disposed**
11. Enter notes related to the task in the **Work notes** field.
12. Select **Close Task**.

Result
The actual time you worked on the task completion is automatically calculated. An entry for the time worked is created in the Time Worked tab of the asset repair task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Record time worked on a repair task manually in the Hardware Asset Workspace

Create an entry for the time worked on an asset repair task manually in the Hardware Asset Workspace.

Before you begin

Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order that you're working on.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you're working on.
6. Select the **Repair asset tasks** tab.
7. Select the task for which you want to record time manually.
8. Indicate that you started work on the task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. Select **Record Time**.
10. In the **Record Time** dialog box, enter the details of the time worked.
    a. Enter the time duration that you worked on the task in the **Days**, **Hours**, and **Minutes** fields.
    b. **Optional:** Provide any additional information in the **Comments** field.
11. Select **Save**.

Result

The Time Worked form is saved and the time card is added to the Time Worked tab of the asset repair task.

Pause a repair task in the Hardware Asset Workspace

Record a break from a repair task in the Hardware Asset Workspace if you're not continuing to work on it. Resume the task when you start working on it again. The system automatically tracks and calculates the actual time taken to complete the task even though the work was interrupted.

Before you begin

You can pause an asset repair task that is in the Work in Progress state. The option to pause the task is available only after you perform the following actions for the asset repair task:

1. Indicate that you have started working on the task by selecting **Start Work**.
2. Start recording the time by selecting **Start Timer**.

Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order that you're working on.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you're working on.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select the **Repair asset tasks** tab.
7. Select the task that you want to pause.
8. Select **Pause Work**.
   The **Pause Work** changes to **Resume Work**
9. Select **Resume Work** when you're ready to work on the activity again.

Result
Each time you pause or resume work on the task, the actual time you worked on the task is automatically calculated. An entry for the time worked is created in the Time Worked tab.

Manage the lifecycle of hardware models with calculated lifecycle templates

Manage the complete lifecycle of hardware models by creating calculated lifecycle templates and associating these templates with the models.

Create Calculated lifecycle templates in the Hardware Asset Workspace

Create Calculated lifecycle templates to manage the complete lifecycle of hardware models efficiently.

Before you begin
Role required: asset

Procedure
1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset Operations**.
2. From the **Hardware asset normalization** list, select **Calculated lifecycle templates**.

   The list of existing Calculated lifecycle templates is displayed.
3. Select **New**.
4. On the form, fill in the fields.

Create New Calculated Lifecycle Template form

Field	Description
Name	Name of the Calculated lifecycle template.
Description	Brief information about the template.
Active	Option to indicate that the Calculated lifecycle template is available for use.

5. Select **Save**.
   The **Calculated Lifecycle formulas** tab is displayed with the list of calculated lifecycle formulas for the following lifecycle phases:
   - **End of Extended Support**
   - **End of life**
   - **End of Sale**
   - **End of Support**
   - **End of General Availability**
6. Define the calculated lifecycle formula for a lifecycle phase.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select the calculated lifecycle formula.

b. In the **Phase start** and **Phase end** fields, enter the number of months for calculating the start date and end date of the lifecycle phase.

c. Select **Save**.
The calculated lifecycle formula is updated with the values that you entered in the Phase start and Phase end fields.

What to do next
Associate a hardware model with a Calculated lifecycle template.

Associate a hardware model with a Calculated lifecycle template

Associate a hardware model with a Calculated lifecycle template to populate the lifecycle details of the model automatically.

Before you begin
Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Model management**.
2. Select the **All models** tab.
3. Select the model that you want to associate with a Calculated lifecycle template.
4. In the Model Details section of the Model form, enter the template details.
   a. In the **Calculated lifecycle template** field, select the calculated lifecycle template that you want to apply to the model.
   b. In the **Calculated lifecyle start date**, select the date from which the Phase start date and Phase end date are calculated for each lifecycle phase defined in the Calculated lifecycle template that you selected.
5. Select **Save**.

Result
The list of lifecycle phases with details such as Phase start date, Phase end date, and Source is displayed in the Model Lifecycles tab.

Create an internal lifecycle in the Hardware Asset Workspace

Create a custom (internal) lifecycle to explicitly specify lifecycle dates for a selected hardware or consumable model in the Hardware Asset Workspace.

Before you begin
Role required: asset

About this task
Beyond approximated and calculated lifecycles, Hardware Asset Management supports custom (internal) lifecycle records. You can define a custom lifecycle phase for a hardware or consumable model. A custom (internal) lifecycle enables you to specify lifecycle dates that are specific to your organization or override existing Content Library data, to improve lifecycle coverage and accuracy. Each custom lifecycle record represents a single lifecycle phase and includes a manually defined phase start date.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Model management**.
2. Open the create lifecycle form for the hardware model or consumable model record.

Option	Description
Open the Hardware Model Lifecycles tab	**a.** Select the **Hardware models** tab in the Model management page. **b.** Select a hardware model record. **c.** Select the **Hardware Model Lifecycles** tab. **d.** Select **New**. The Create New Hardware Model Lifecycle form is displayed.
Open the Consumable Lifecycles tab	**a.** Select the **Consumable models** tab in the Model management page. **b.** Select a consumable model record. **c.** Select the **Consumable Model Lifecycles** tab. **d.** Select **New**. The Create New Consumable Model Lifecycle form is displayed.

3. On the form, fill in the fields.
   For field descriptions, see Model lifecycle form fields.
4. Select **Save**.

Result

The custom lifecycle record is created and listed in the Hardware Model Lifecycle or Consumable Model Lifecycle related list. The **Source** field is automatically set to **Internal**.

Related topics

Model lifecycle form

Hardware model details

Consumable model fields

Receive asset warranty details from Lenovo

Connect to the Lenovo Warranty API and get the warranty details of your hardware assets.

Related topics

Integration with Lenovo for asset warranty details

Track the warranty details of your Lenovo assets

View and track the warranty details of your Lenovo hardware assets from a central location in the Asset operations view of the Hardware Asset Workspace.

Before you begin

Role required: asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Asset warranty** list, select **Asset warranties**.
   - To see whether an asset is still in warranty, check the **Status** column.
   - To track warranties that are nearing expiration, check the **End Date** column of the asset record and the asset's status.
3. **Optional:** Select a warranty record to view more details.

Asset lifecycle and disposal

Manage the full lifecycle of hardware assets from refresh and replacement through reclamation, disposal, and donation.

Perform these tasks as needed to manage hardware asset lifecycle and disposal operations in HAM.

Task details

Task	Description
Request a Hardware Asset Refresh	Initiate a refresh request to replace an aging or end-of-life hardware asset with a newer model.
Manage refresh of assets using Zero Touch Refresh	Fulfill hardware asset refresh requests of your employees through an external provider using the Zero Touch Refresh flow.
Manage your expiring contracts for leased hardware assets	Use the lease contract expiration flow to act on leased hardware assets before their contracts expire.
Reclaim hardware assets	Reclaim hardware assets from employees who have left the organization or no longer need the assets.
Create a disposal order	Create a disposal order to retire hardware assets that aren't functional or no longer in use.
Donate assets to charity organizations	Donate retired hardware assets to registered charity organizations as part of your disposal process.
Manage asset bundles from your inventory	Track, reserve, or deploy multiple assets together by creating asset bundles from your inventory.
Manage obligations	Create obligation records and tasks to define specific instructions required to fulfill a contract obligation.
Manage contract repository agentic workflow in the Hardware Asset Workspace	Extract metadata and obligations from signed contracts and set renewal or termination reminders automatically.

Request a Hardware Asset Refresh

Use the Hardware Refresh request flow to track the aged hardware assets that are nearing the end of their life cycle. Replace them with new hardware assets.

Before you begin

Role required: Inventory_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

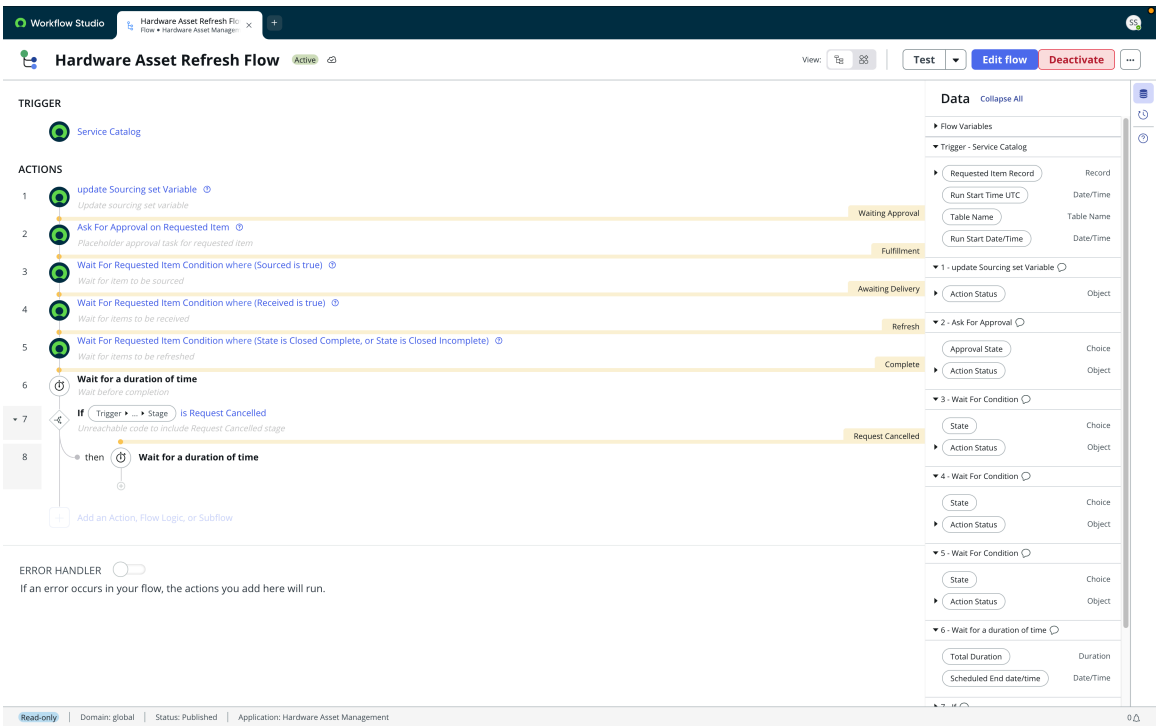
About this task

When hardware assets get old, their maintenance costs and risks of failure increase, while their performance decreases. You can choose to replace all the old hardware assets with the same or different models of new hardware assets. After your Hardware Asset Refresh request is approved, the Hardware Asset Refresh flow takes you through sourcing and it triggers the Hardware Asset Refresh Line flow. The Hardware Asset Refresh Line flow uses Refresh Line tasks to take you through the steps of preparing the new asset, scheduling it for delivery, deploying it, and reclaiming the aged asset.

The Flow Designer application is used to create the Hardware Asset Refresh flow and the Hardware Asset Refresh Line flow. While customizing the Hardware Asset Refresh module, don't remove or customize the **Update Sourcing set Variable** step in the Hardware Asset Refresh flow.

Note: You can check if a hardware model is eligible for refresh by using the Eligible for refresh field of the Hardware [alm_hardware] table. The SAM - Calculate Asset Refresh Eligibility scheduled job runs weekly and invokes the *`Process`* method in the *`SAMRefreshEligibityCalculator`* Script Include. The Script Include fetches the hardware product model records for the assets for which the useful_life field (in months) is specified. The date on which the asset record was created is compared with the useful_life field to determine if the asset is in the useful life period. The Eligible for refresh flag is set to true for assets that aren't in the useful life period.

Hardware Asset Refresh Flow



While customizing a Hardware Asset Refresh catalog item on the Catalog Item form, don't remove or change the following variables.

Hardware Asset Refresh Catalog Item form

Tabs in the Catalog Item	Variables
Variables	Type of refresh
	Process
Variable Sets	Hardware Asset Management process set

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware Asset Refresh Catalog Item form (continued)

Tabs in the Catalog Item	Variables
	Hardware Asset Management sourcing set

Note: There are readily available decision tables that you can use to customize the Hardware Asset Refresh Line Flow. For more details, see Hardware Asset Management flow customization.

Procedure

1. Navigate to **All** > **Service Catalog** > **Asset Lifecycle**.
   The **Asset Lifecycle** category isn't on the Service Catalog page by default. To add this category, select the add content icon ( ) beside the search catalog bar and then select **Asset Lifecycle**.
2. Open **Hardware Asset Refresh Order**.
3. If you want to replace all the aged hardware assets with the same model of new hardware assets, do the following:

   a. From the **Type of refresh list** field, select **Single model**.

   b. On the form, fill in the fields.

   Hardware Asset Refresh form

Field	Description
Replacement model	New hardware asset model that you want to replace the aged hardware assets with.
Location	Location where you want to deploy the new asset. By default, this field is set to the location of the logged-in user. However, you can select a location from the list of available locations.
Assets	Aged Hardware assets that you want to replace. You can use a filter to search for hardware assets that you want to replace.

4. If you want to replace the aged hardware assets with different models of new hardware assets, do the following:

   a. From the **Type of refresh** field, select **Multi model**.

   b. Select **Add**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. For each new hardware asset that you want to use, add a row to enter the hardware model.

Note:

You can create 50 rows.

You can't create multiple rows for the same aged hardware asset that you want to replace.

The single-model and multi-model refresh flows apply different default filters. In the single-model flow, a default **Eligible for refresh = true** filter is applied, which you can clear or modify. In the multi-model flow, this default eligibility filter isn't applied.

If an asset appears in the multi-model flow but not in the single-model flow, check whether the asset is marked **Eligible for refresh** in the Hardware [alm_hardware] table.

5. Select **Order Now**.
   You can't view an excluded asset. For more information, see Hardware Asset Management license exclusion.

Result

The aged assets are set to get refreshed. In the Hardware table under the Disposal related list of the aged assets, the **Refresh request line** field is populated.

An Order status page appears and it displays the details of the order. A request is created to source the new hardware assets and to replace the aged hardware assets. The Request form shows the total price of all the new hardware asset models.

Use Hardware Asset Refresh Lines tasks to replace the aged assets

Replace aged hardware assets by sourcing new hardware assets.

Before you begin

Role required:

- proc_user for sourcing.
- asset and itil for Refresh Line tasks.

About this task

When refreshing hardware assets, you don't have to update the asset records manually. When closing the hardware asset refresh lines, the asset records and the assets are automatically updated. Close each task to go to the next task, complete the refresh, and reclaim the aged assets.

After sourcing the new assets, the asset refresh is completed through the following stages:

- Prepare asset task: Prepare the new asset before you hand it over to the requester. For example, install any software that's required.
- Schedule refresh task: Schedule a date to hand over the asset to the requester.
- Deploy new asset: Hand over the asset to the requester or install the asset at the requester's location if necessary.
- Reclaim aged asset: Collect the aged asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Select the hardware asset refresh request.

Interface	Action
Core UI	**a.** Navigate to **All** > **Service Catalog** > **Open Record** > **Requests**. **b.** Select the request number of the hardware asset refresh request that you want to fulfill.
Hardware Asset Workspace	**a.** Navigate to **All** > **Hardware Asset Work space** > **Procurement view**. **b.** Select the **Requests** tab. **c.** Select the request number of the hardware asset refresh request that you want to fulfill.

   After your hardware asset refresh request is approved, the following events happen:

   - The Source Request flow is triggered to source new assets.
   - In the **Catalog Tasks** tab, a catalog task is created for the procurement of the new hardware asset.

2. Source items in the request.
   You can source items in the request by consuming the local stock, through purchase orders, or through transfer orders.

   For more details on sourcing items, see Sourcing items in a service catalog request.

   After the new asset is received, the following events happens:

   - The Hardware Asset Refresh Line flow is triggered for the asset.
   - The Hardware Asset Refresh Line tab is displayed next to the Asset Tasks tab on the requested item form.
   - The Asset pick task is created under the Refresh Line Tasks only if the requested item is consumed from the local stockroom for which the Asset pick task is enabled. Otherwise the Prepare asset task is created directly without the Pick task. For details, see Enable the Asset pick task for your stockroom in the Hardware Asset Workspace.

3. Select the **Hardware Asset Refresh Line** tab.
4. Select the hardware asset refresh line.
5. Select the **Refresh line tasks** tab.

   Note: The **Asset** field on refresh line task records is not populated. The task record uses the *refreshing_asset* field for the asset being replaced and the *replacement_asset* field for the new asset being deployed.

6. Complete the Asset pick task by using the Mobile Agent application.
   For details on completing this step, see Locate and pick the hardware assets in your stockroom using the Mobile Agent application.
7. Prepare the asset.
   a. Select the **Prepare asset** task.
   b. In the **Asset** field, select the hardware asset that you want to replace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select **Save**.

d. Select **Close Task**.

- A Schedule refresh task is created under the Refresh Line Tasks.
- The state of the Replacement asset changes to In stock.
- The substate changes to Reserved.
- The **Reserved for** field is populated with the requester details.

8. Complete the Schedule refresh task.

a. Select the **Schedule refresh** task.

b. In the **Scheduled deployment date** field, select the date on which the new asset will be deployed.

c. Select **Close Task**.

- The Deploy new asset task is created under the Refresh Line Tasks.
- The state of the Replacement asset changes to In stock and the substate changes to Pending install.

9. Complete the Deploy new asset task.

a. Select the **Deploy new asset** task.

b. Confirm if you have reclaimed the old asset in the **Is reclaimed** list.

- If you've collected the aged asset, select **Yes**.
- If you didn't collect the aged asset, select **No**.

The Location field shows the location where the new asset should be deployed.

c. Select **Close task**.

Note: If you select **Yes** from the Is reclaimed list, then the Reclaim aged asset task is also closed by default.

- Reclaim aged asset task is created under the Refresh Line Tasks.
- The state of the replacement asset changes to In use.
- The allocations are transferred from the aged asset to the replacement asset.

10. Complete reclaiming the aged assets.

a. Select the **Reclaim aged asset** task.

b. Confirm if you have reclaimed the old asset in the **Is reclaimed** list.

- If you've collected the aged asset, select **Yes**.
- If you didn't collect the aged asset, select **No**.

c. Select **Close task**.

Note: You can cancel the hardware asset Refresh Line either by selecting **Cancel** or by changing the **State** field to **Closed Incomplete** in the Refresh Line task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

After the aged hardware asset is reclaimed, the following changes happen on the Hardware form:

- The state of the aged asset changes to In stock.
- The substate changes to Pending disposal.

When the refresh workflow completes and the asset transitions to **In stock** and **Pending disposal** state, the system clears the **Refresh request line** field on the aged asset record. This field displays only active refresh processes.

Manage refresh of assets using Zero Touch Refresh

Enable your employees to request hardware refreshes through an external vendor by using the Zero Touch Refresh flow on your ServiceNow instance. This process enables you to eliminate having to maintain a local inventory of new assets.

For details on the stages in the Zero Touch Refresh flow, see Zero Touch Refresh.

Fulfill a Zero Touch Refresh Fulfillment Request

As a provider, ship a replacement asset requested through a Zero Touch Refresh Fulfillment Request to the requester.

Before you begin

The Service Exchange configuration necessary for the Zero Touch Refresh flow must have been set up. For more details, see Service Exchange configuration for Zero Touch Refresh.

Role required: admin, asset, procurement_user, or inventory_user

About this task

When an employee submits a Zero Touch Refresh request on the ServiceNow® instance of your customer, a corresponding Zero Touch Refresh Fulfillment Request is created on your ServiceNow® instance.

Procedure

1. Log in to your ServiceNow® instance.
2. Navigate to **All** > **Zero Touch Refresh Fulfillment Requests**.
3. Select a request that is in the Requested state.
4. Review the details on the Zero Touch Refresh Fulfillment Request form.

   The Customer request number field shows the corresponding Zero Touch Refresh request number. The fields in the Shipment details tab and the Return shipment details tab are populated with the details specified in the Zero Touch Refresh request.

5. Confirm the Zero Touch Refresh Fulfillment Request.
   a. In the **State** field, select **Order confirmed**.
   b. Select **Save**.
6. Ship the replacement asset to the requester or to the stockroom.
   a. Enter the asset information in the **Asset tag** and **Serial number** fields.
   b. In the **Shipment details** tab, enter values in the **Tracking number** and **Carrier** fields.
   c. In the **Return shipment details** tab, enter values in the **Tracking number** and **Carrier** fields.
   d. In the **State** field, select **Shipped**.
   e. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

f. In the shipment, include a box that the employee can use to return the old asset with an address label made out for the stockroom.

g. Ship the new asset to the requester or to the stockroom location where the requester can pick up the asset.

Result

An asset with the serial number and asset tag specified in the Zero Touch Refresh Fulfillment Request is assigned to the employee.

Process a Zero Touch Refresh request

Process a Zero Touch Refresh request to receive the assets from your provider and complete the Zero Touch Refresh flow.

Before you begin

The Service Exchange configuration necessary for the Zero Touch Refresh flow must have been set up. For more details, see Service Exchange configuration for Zero Touch Refresh.

Role required: admin, asset, procurement_user, or inventory_user.

About this task

After the provider ships the assets, the Zero Touch Refresh flow completes when the following actions have occurred:

1. The employee confirms that the replacement asset is received.
2. The inventory manager or the asset manager confirms and evaluates the old asset that was received.

Procedure

1. Log in to your ServiceNow® instance.
2. Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**.
3. From the **Zero touch refresh list**, select **Requests**.
4. Select the request that you want to process.
5. Select the **Zero Touch Refresh Tasks** tab.
6. As a stockroom manager, notify the employee that the new asset is ready for pickup.
   a. Select the **Ready for pickup** task.
   b. Select **Close Task**.
   - An email message is sent to notify the employee that the asset has arrived in the stockroom and is ready for pickup.
   - The Receive asset task is created.
7. Confirm that the Receive asset task is closed.
   - If the employee has acknowledged receipt of the replacement asset online, the task is closed automatically.

     For more details, see Acknowledge receipt of an asset on a mobile device or Acknowledge receipt of an asset through the Core UI.
   - If the asset has been picked up at the stockroom but the employee has not acknowledged receipt online, users with the admin or asset role can close this task on behalf of the employee by accessing the task and selecting **Close task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. Confirm that the old asset was returned to the stockroom.
   a. Select the Receive return asset task.
   b. Select **Close task**.
      - The Receive asset task is closed.
      - The Asset evaluation task is created.
9. Evaluate the old asset and select the appropriate status.
   a. Select the Asset evaluation task.
   b. In the **Evaluation status**, mark the asset for reuse, repair, or ready for disposal.
      - To mark the asset for reuse, select **Re-deployable**.

        The state and substate of the asset are set to In stock and Available.
      - To mark the asset for repair, select **Needs repair**.

        This option initiates the Return Merchandise Authorization (RMA) flow.

        The state and substate of the asset are set to In stock and Pending repair.
      - To mark the asset as ready for disposal, select **To be disposed**.

        The state and substate of the asset are set to In stock and Pending disposal.
   c. Select **Close task**.

Result
The Zero Touch Refresh flow completes. The stage and state of the Zero Touch Refresh request change to Closed complete and Completed.

Manage your expiring contracts for leased hardware assets

Use the lease contract expiration flow and decide on what to do before your leased hardware asset contract expires. Get notifications about the lease contracts that are nearing their expiration dates.

Before you begin
Role required: contract_manager

About this task
When a lease contract is nearing its expiration, contract administrators and business owners are notified 90, 60, and 30 days before the expiration date. Getting these notifications early can help give them enough time to act and to avoid paying a penalty. You can customize the email notifications by navigating to **System Notification** > **i** > **Notification** > **Lease contract threshold breached**.

You can view a consolidated list of asset contracts that are expiring on the Hardware Asset Dashboard in the month, quarter, and year formats. For more information, see Hardware Asset Dashboard.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

When the Hardware Asset Management license is activated, the **Renew** UI button doesn't appear for active lease contracts that have assets covered.

If an asset is associated with more than one lease contract, then the **Lease contract** field on the asset record reflects the most recently associated contract.

There are readily available decision tables that you can use to customize the Lease Contract Expiration Flow, Leased Asset Buyout Flow, Leased Asset Extension Flow, and Leased Asset Return Flow. For more details, see Hardware Asset Management flow customization.

With the lease contract expiration flow, the possible lease actions are buying out the leased asset, extending the lease agreement, or returning the asset or another like product.

Note: For an asset covered, if the **Date removed** field is in the past, then the state of the asset is automatically set to Canceled and you can't take any lease actions.

Procedure

1. Navigate to **Contract** > **Contracts** > **Leases**.
   The Lease page opens. It shows a list of lease contracts.
2. Open the relevant active lease contract and click the **Begin Lease expiration process** related link.

   Note:

   The **Begin Lease expiration process** related link is visible only in active contracts that have at least one asset covered.

   You can't choose a lease action such as Buy out, return, and extend for an excluded lease asset. For more information, see Hardware Asset Management license exclusion.

   The Leased Assets related list shows all the hardware assets that are covered in the lease contract.

   In each asset record that is covered under the lease agreement, a Planning task is generated. The Planning task is automatically assigned to the contract administrators.
3. Under the Leased Assets related list, perform any of the following to take a lease action:
   - Open a record and then open the Planning task. In the Planning task, select a lease action from the Lease action list.
   - Open an asset. From the Asset Covered form, select a wanted lease action from the Lease action list.
   - On the list of assets, double-click the **Lease action** field of an asset and select a lease action.

   A set of tasks is created. If you select a lease action by a method other than opening the Planning task, then the state of Planning task is automatically moved to Closed.

   Note: By default, the Planning tasks are created only for the first 1000 assets under the contract. If you want to create Planning tasks for more than 1000 assets, then you can change the default value (1000) of the `com.sn_hamp.flow.lease_contract_expiration.max_results` key in the Asset Property (asset_property.list) table. Only users with the asset role can change this property.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
Based on your selected action, the corresponding workflow is triggered and the associated Contract Asset tasks are created. Close one task to go to the next task.

What to do next
Based on what lease action you selected, perform any of the following:

- Return your leased hardware asset.
- Buy out your leased hardware asset.
- Extend your lease contract.

Return your leased hardware asset

Return your hardware asset before the contract expires and avoid paying a penalty.

Before you begin
Role required: asset, itil, contract_manager, inventory_admin, or ham_admin

About this task
After you choose to return your leased asset, various Contract Asset tasks are created to take care of the return process for leased assets. Close each task to go to the next and to complete the process.

Procedure
1. Open a lease record.

UI	Action
Core UI	**a.** Navigate to **All** > **Contract** > **Contracts** > **Leases**. **b.** Select a lease record.
Hardware Asset Workspace	**a.** Navigate to **All** > **Hardware Asset Work space** > **Contract management**. **b.** Select the **Leases** related list and select a lease record.

2. Select the Leased Assets related list.
3. Select an asset.
4. Under the **Contract Asset Tasks** tab, select the Planning task.
5. On the Contract Asset Task form, select **Return** from the Lease action list.
6. Change the **State** to **Closed Complete**.
   To take a lease action, you can follow any of the ways mentioned in Manage your expiring contracts for leased hardware assets.
   A Collection task is generated under the **Contract Asset Tasks** related list.
7. Select the Collection task.
8. If you successfully collected the asset, then do the following:
   a. Select the **Asset collection** tab.
   b. Set the **Asset collected** field to **Yes**.
   c. In the **Stockroom** field, enter the stockroom where the asset is stored.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

On the Hardware form of the leased asset, the asset is moved to the In stock state and to the Pending transfer substate.

9. If you haven't collected the asset from your user, then do the following:

   a. Update the **Asset collected** field to **No**.
   The **Action change** field appears under the **Asset collection** tab.

   b. If you're unable to collect the leased asset from your user and you want to buy out the leased asset, select **Buyout** from the Action change list.
   Further buyout-related tasks are created to take care of the buyout process. See Buy out your leased hardware asset.

   c. If you're unable to collect the leased asset from your user, and if you want to extend the lease contract, select **Extend** from the Action change list.
   Further extension-related tasks are created to take care of the lease extension process. See Extend your lease contract.

   d. If you're unable to collect the leased asset from your user and the leaser agrees that you return another similar asset, then do the following:

      i. Select **Like-kind return** from the Action change list.

      On the original asset, the **Like-kind exchange** field is populated and the asset moves to the Missing state.

      ii. From the **Like-kind returned asset** field, select the asset that you want to return to the leaser.

      iii. From the **Stockroom** field, select the stockroom that contains the like asset that you want to return.

      Further return-related tasks are created for the like asset to take care of the return process.

      In the Hardware form, the following changes occur:

      - The asset is moved to the Missing state.
      - The like asset is moved to the In stock state and to the Pending transfer substate.

10. On the Collection task form, close the task.
    During the return confirmation, if there's a need of settlement, you can update the **Settlement** field to **Yes** and update the **Settlement amount** field with the settlement cost. If you do this, a Return Settlement task and a Purchase order are then generated. After the Purchase order is moved to the Received state, the Settlement task is closed automatically.
    After the Collection task is closed, a Preparation task is created to remove device allocations of the asset.
11. Under the **Contract Asset Tasks** related list, open the Preparation task.
12. On the form, change the **State** field to **Closed Complete**.
    After the Preparation task is closed, a Shipment task is created to update the shipment details.
13. Under the **Contract Asset Tasks** related list, open the Shipment task.
14. Update the **Shipping carrier**, **Ship date**, and **Tracking number** fields.
15. Close the Shipment task.
    A Return Confirmation task is created. On the Hardware form, the leased asset is moved to the In transit state and to the None substate.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

16. Under the **Contract Asset Tasks** related list, open the Return Confirmation task and do the following:
    a. Set the **State** field to **Closed Complete**.
    b. Set the **Return confirmation** field to **Yes**.

Result

The Return Confirmation task is automatically assigned to the contract administrator. If necessary, you can assign it to any other user.

On the Hardware form of the leased asset, the asset is moved to the Retired state and to the Lease return substate.

Buy out your leased hardware asset

Buy out your leased hardware asset before the contract expires and avoid paying a penalty.

Before you begin

Role required: asset, itil, contract_manager, inventory_admin, or ham_admin

About this task

After you choose to buy out your leased asset, various Contract Asset tasks are created to take care of the purchase process for leased assets. Close each task to go to the next task and to complete the process.

Note: To close the Buyout tasks, the Purchase order that is created for the leased asset must be approved by the Procurement manager.

Procedure

1. Navigate to **All** > **Contract** > **Contracts** > **Leases**.
2. Click the Leased Assets related list.
3. Open an asset.
4. Under the **Contract Asset Tasks** related list, open the Planning task.
5. On the Contract Asset Task form, select **Buyout** from the Lease action list.
6. Change the **State** to **Closed Complete**.
   To take a lease action, you can follow any of the ways mentioned in Manage your expiring contracts for leased hardware assets.

   The Purchase order and Purchase order lines are created. In the Purchase order form, the **PO Type** field under the Details section is set to **Lease buyout**. You can order the Purchase orders only after completing all the asset tasks that are associated with the line items of the Purchase order.

   After receiving the Purchase orders, Expense lines are created to track the cost of the buyout.

   If the lease Buyout Purchase order of your contract is in the Requested state, and if some assets covered under the same contract are updated with the Buyout lease action, then the Purchase order lines of the assets covered are appended to the Purchase order. A new purchase order is created only if an existing Purchase order for a lease buyout is not in the Requested state.

   A Buyout task is created to update the buyout information.
7. Under the **Contract Asset Tasks** related list, open the Buyout task.
8. Under the **Buyout details** tab, do the following:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Update the **Buyout date** field with the date on which you want to purchase the asset.

b. Update the **Buyout amount** field with the amount to purchase the asset.

9. Fill in the fields as required.
10. Change the **State** field to **Closed Complete**.

    After you update the **Cost** field on the Purchase order line, the **Buyout amount** field is automatically populated with the same amount. You can change the **Cost** field on the Purchase order line until the Buyout task is closed.

    A Buyout Confirmation task is created to take care of the confirmation process.

11. Under the **Contract Asset Tasks** related list, open the Buyout Confirmation task and do the following:

    a. Fill in the required fields.

    b. Update the **Buyout confirmation field** to **Yes**.

    c. Change the **State** field to **Closed and Complete**.

    If you want to change the **Buyout amount** field from the Buyout Confirmation task form, you can change the amount from the Purchase order.

    To close the Buyout Confirmation task, the Purchase order must be in the Received state.

Result

After a buyout is confirmed, the following changes occur in the asset record under the **Financial** tab:

- The **Cost** field is updated to the buyout amount.
- The **Acquisition method** field is changed to Purchase.

Extend your lease contract

Extend your lease contract before the contract expires and avoid paying a penalty.

Before you begin

Role required: itil, contract_manager, inventory_admin, or ham_admin,

About this task

After you choose to extend the lease contract of your asset, various Contract Asset tasks are created to take care of the contract extension process. Close each task to go to the next task and to complete the process.

Note: To close the Extension tasks, the Purchase order that is created for the leased asset must be approved by the Procurement manager.

Procedure

1. Navigate to **All** > **Contract** > **Contracts** > **Leases**.
2. Under the Related Links section, click the Leased Assets related list.
3. Open an asset.
4. Under the **Contract Asset Tasks** tab, open the Planning task.
5. Select **Extension** from the Lease action list.
6. Change the **State** field to **Closed Complete**.
   To take a lease action, you can follow any of the ways mentioned in Manage your expiring contracts for leased hardware assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Purchase order and Purchase order lines are created. The **PO Type** field on the Purchase order line is automatically set to **Extension**. You can order the Purchase orders only after completing all the asset tasks that are associated with the items of the Purchase Order line.

After the Purchase orders are created, Expense lines are created to track the costs of the contract extension.

An Extension task is created to take care of the extension process.

7. Under the **Contract Asset Tasks** related list, open the Extension task.
8. Under the **Extension details** tab, update the **Extension start date** and **Extension end date** fields.
9. Update the **Extension cost** field with the amount to extend the lease agreement of the asset covered.
   The Purchase order line is automatically updated with the same amount.
10. Change the **State** field to **Closed Complete**.
    An Extension Confirmation task is created to take care of the confirmation process.
11. Under the **Contract Asset Tasks** related list, open the Extension Confirmation task.
    If you want to change the Extension amount from the Extension Confirmation task, then you can change the amount from the Purchase order.

    Note: To close the Extension Confirmation task, the Purchase order must be in the Received state.

12. Set the **Extension confirmation** field to **Yes**.
13. Change the **State** field to **Closed Complete**.

Result

A new contract is created with the start and end dates set as the extension start and end dates.

Reclaim hardware assets

Reclaim hardware assets efficiently and store them in the inventory, reassign, send it for repair, or dispose of as required.

Submit an asset reclamation request

Use Reclaim Asset catalog item to efficiently reclaim hardware assets when an employee leaves an organization or moves to a different role.

Before you begin

Important: Asset reclamation supports hardware and consumable assets. Asset bundles and pallets aren't supported by default and require customization of the reclamation flow and request to handle these asset classes.

Role required: Any employee can submit an asset reclamation request.

About this task

Note: To exclude a lost or stolen asset from the Reclamation form, open the asset record, clear the **Assigned to** field, and select **Save**. The asset no longer appears in the Reclamation form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Service Catalog**.
2. Select Asset Lifecycle.
3. Select Reclaim Asset from the Items list.
4. On the Catalog Item to kick off Reclaim Asset workflow form, fill in the fields.

Catalog Item to kick off Reclaim Asset workflow

Fields	Description
Requested by	The role of the person, such as an HR professional, Manager, or Employee, who submits the asset reclamation. ○ If Manager is selected, all the employees reporting to the Manager appear in the **Requested for** field. ○ If Employee is selected, the **Requested for** is set to read-only.
Requested for	Person for who you're submitting the asset reclamation.
Employee separation	Whether the person for who you're submitting the asset reclamation is leaving the organization or moving to a different role.
Asset	Hardware assets assigned to the person for who you're submitting the asset reclamation.
Reclaim method	The method how you want to collect the hardware assets from the departing employee. You can pick up the assets or the employee can either drop off or ship them to the organization.
Legal hold method	If the hardware assets need to be kept on hold because of any legal reasons.
Notes/Special instructions	Any instructions if you want to mention.

5. Select **Submit**.
   An Asset Reclamation Request is created.

Close an asset reclamation request

Efficiently reclaim hardware assets when an employee leaves an organization or moves to a different role.

Before you begin

Role required: inventory_user or inventory_admin

About this task

For each reclaimed asset, a Hardware Asset Reclamation Line is created. For each Hardware Asset Reclamation Line, at most three Hardware Asset Reclamation Tasks are created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You must close all the tasks of a Hardware Asset Reclamation Line to close the Hardware Asset Reclamation Line. After all Hardware Asset Reclamation Lines are closed, the Asset Reclamation Request is closed.

Procedure

1. Navigate to **All** > **Inventory** > **Asset Reclamation** > **Asset Reclamation Request**.
2. Open the Asset Reclamation Request that you want to close and then open a Hardware Asset Reclamation Line.

   Note: To search for a specific asset reclamation request, use the search bar or filter options on the Asset Reclamation Request list. You can filter by fields such as Requested for, State, or Request number.

   Based the Reclaim method selected while submitting the Asset Reclamation request, a Schedule drop off, Schedule pickup, or Schedule shipment task is created in the Hardware Asset Reclamation Line.
   The **Stage** field of the Hardware Asset Reclamation Line form shows **Ready**.
3. Open the Schedule drop off, Schedule pickup, or Schedule shipment task that is present in the Hardware Asset Reclamation Line.
4. On the form, fill in the fields.

Schedule shipment task form

Field names	Description
Assignment group	Group to which the Schedule shipment task is assigned.
Assigned to	User from the assignment group to whom the Schedule shipment task is assigned.
Stockroom	Location where the reclaimed assets are stored. This field is required.
Shipping carrier	Name of the carrier vendor who ships the asset to the stockroom. This field is required and it is a reference to the Shipment carrier [sn_itam_shipping_carrier] table.
Tracking number	Shipment reference number given by the carrier vendor. This field is required.
Ship date	Date on which the asset is shipped. This field is required.
Work notes	Any additional information that you want to mention.

5. Select **Close Task**.
   The **Stage** field of the Hardware Asset Reclamation Line form changes from **Ready** to **Pending received**.
   A Receive asset task is created in the Hardware Asset Reclamation Line.
6. Open the Receive asset task.
7. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Receive asset task form

Field names	Description
Assignment group	Group to which the Receive asset task is assigned.
Assigned to	User from the assignment group to whom the Receive asset task is assigned.
Is asset reclaimed?	Select this check box if you've received the assets. This check box is required.
Quantity received	Number of consumables received. This field is required and appears only if the Hardware Asset Reclamation Line is created for a consumable.
Work notes	Any additional information that you want to mention.

8. Select **Close Task**.

   The **Stage** field of the Hardware Asset Reclamation Line form changes from **Pending received** to **Pending evaluation**.

   After an asset is received, in the asset form, the following changes occur:

   - The **Assigned to** field on the asset record becomes empty.
   - State of the asset changes to In stock and Substate changes to Pending repair.

9. On the form, fill in the fields.

Evaluate asset task form

Field names	Description
Assignment group	Group to which the Evaluate asset task is assigned.
Assigned to	User from the assignment group to whom the Evaluate asset task is assigned.
Evaluation status	Status of the reclaimed asset. This drop-down list is required and the available values are: - Re-deployable - Needs repair - To be disposed
Work notes	Any additional information that you want to mention.

10. Select **Close Task**.
    Based on what you selected from the **Evaluation status** drop-down list, the State, and Substate of the asset change as follows:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Evaluation status values	Asset state and substate	
	State	Substate
Re-deployable	In stock	Available
Needs repair	In stock	Pending repair
To be disposed	In stock	Pending dispose

The **Stage** field of the Hardware Asset Reclamation Line form changes from **Pending evaluation** to **Complete**.

Note: When the stage of all Hardware Asset Reclamation Lines has changed to Closed Complete, the state of the Asset Reclamation Request also changes to Complete.

Create a disposal order

Create a disposal order for hardware or consumable assets. You can create a disposal order for an asset reaching its end of life cycle or an asset that is no longer functional.

Before you begin

Role required: asset

Note: Install the Hardware Asset Management application from the ServiceNow Store.

About this task

To add the consumables to a disposal order, select **Mark for disposal**. This will set the Planned for disposal field to **true**. For more details, see Dispose of consumable assets.

Use the Workflow Studio application to create the Hardware Asset Disposal flow to take you through the entire hardware disposal order process.

The hardware disposal order goes through various stages before it's completed. Each stage is associated with a hardware disposal task. To move through the various stages, close each task until you reach the last stage. After you complete the last task, the hardware disposal order is complete. For more information about the hardware disposal order stages, see Hardware disposal order stages.

You can cancel a disposal order until it reaches the transit stage in the workflow. After your disposal order is in the confirmation stage, you can't cancel that order. You can cancel a task that is in a draft, scheduling, or transit stage by selecting **Closed Incomplete** from the **State** list and closing the task.

Starting with Hardware Asset Management 15.0.0 version, the asset resale option is integrated at the final stage of the disposal workflow that is the Documentation stage. When the Disposal order task is in the Documentation stage, you can choose either to dispose of or to resell the assets. For more information about asset resale, see Resale hardware assets.

Procedure

1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory view**.

Interface	Action
Core UI	Navigate to **All** > **Inventory** > **Create Disposal Order**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
Hardware Asset Workspace	**a.** Navigate to **All** > **Hardware Asset Work space** > **Inventory view**. **b.** Select the **Disposal orders** tab. **c.** Select **New**.

2. On the form, fill in the fields.

Create New Hardware Disposal Order form

Field	Description
Number	Reference number of the disposal order.
Stockroom	Stockroom where the asset is disposed from.
Vendor	Vendor that you want to dispose the asset to.
Location	Location of the stockroom where the asset gets disposed from. The location automatically appears after you select a stockroom. If you change the location and no location is associated with the selected stockroom, the stockroom field becomes empty. In this scenario, you can select a stockroom from the stockroom list for a specified location.
Assigned to	Person responsible for disposing of the asset.

3. Select **Save**.
   The disposal order is created and the hardware asset disposal workflow is triggered.
4. In the Pickup details section of the Hardware Disposal Order Pickup Details form, fill in the fields.

Pickup Details section

Field	Description
Scheduled date	Date when you want to dispose of the asset.
Pickup contact name	Name of the person from the vendor who will pick up the asset to dispose of.
Pickup details	Details of the pickup.
Additional info	Any message if you want to add.

5. Select the **Planned Assets** tab.
6. Select **Add**.
7. From the list of available assets, select the assets that you want to dispose of.
   The assets that you selected are shown in the **Planned Assets** tab. Also, the Verify Asset task is created as a hardware disposal task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. Select the Verify Asset task.
9. Select the asset that you want to verify and select **Verify**.
   You can't select an excluded asset. For more information, see Hardware Asset Management license exclusion.
   The state of the asset changes to retired and the substate changes to pending disposal. The Scheduled Pickup task is created as a hardware disposal task.
10. Update the Schedule Details section with the details of the Vendor, Vendor order ID, Scheduled date, and Pickup contact name and select **Close task**.
    The Asset Departure task is created as a hardware disposal task.
11. In the Schedule Details section of the Asset Departure task, specify the details in the Shipped to, Shipping carrier, and Tracking number fields.
12. Select **Save**.
13. In the Asset Departure task, select the **Planned Assets** tab.
14. Select the assets that you want to depart and select **Depart**.

    Note: Planned assets that aren't departed are canceled automatically.

    The state of the asset changes to in transit and the substate changes to pending disposal. The Vendor confirmation task is created as a hardware disposal task.
15. Select the Vendor confirmation task and then select **Close task**.
    The stage changes to documentation. The Disposal Documentation task is created as a hardware disposal task.
16. Select the Disposal Documentation task and do the following:

    a. Select the Attach File icon to attach disposal documentation for the planned assets.

    b. In the **Certificate of disposal** list, select **Yes**.

    You must attach disposal documentation to the order and set the field to **Yes** to close the Disposal order to Completed.

17. Select **Close Task**.
    - All the hardware disposal tasks are complete and the hardware disposal order stage changes to completed.
    - The **Disposal date** field in the **Disposal** section of the asset form is populated.
    - For any maintenance contracts that are associated with the disposed asset, the **Date removed** field in the **Contracts** tab is populated and the disposed asset is no longer part of the contract.
    - Any entitlements that are associated with the disposed asset are also removed.

Related topics

Resale hardware assets

Resale hardware assets

Enhance asset management by reselling eligible retired hardware assets instead of disposing of them.

Before you begin

Role required: asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Asset resale is an extension of the asset disposal workflow that enables you to resell eligible retired assets instead of disposing of them. This approach helps reduce waste and save costs, because you can receive credit for assets that you successfully resell. When the Disposal order is in the Documentation stage, you can choose between disposing of or reselling the assets.

Procedure

1. Navigate to **All** > *Hardware Asset Workspace* > **Inventory**.
2. Select the **Disposal orders** tab.
3. Select the **Number** link to open the disposal order record that is in the Documentation stage.
   The Disposal order form is displayed.
4. Select the **Hardware Disposal Tasks** tab.
5. Select the **Number** link to open the Disposal Documentation task.
   The Disposal Documentation form is displayed.
6. Select the **Planned Assets** tab.
   The list of assets planned for disposal or resell is displayed.
7. Select the planned asset records that you want to resell.
   The **Sell**, **Dispose**, and **Cancel** buttons are activated.
8. Select the **Sell** button.
   The Add resale value window is displayed.
9. In the Add resale value window, do the following:
   a. Add the resale value for each asset in the Resold value column.
   b. From the Currency drop-down, select the currency value.
10. Confirm or cancel the resell.
    - To mark your confirmation and proceed with asset resell, select **Confirm**.
    - To close the Add resale value window, select **Cancel**.

    On the Planned Assets list, the State, Substate and Resold value column value is updated for the resold assets.
11. Select the **Details** tab and do the following:
    a. Select the Attach File icon to attach disposal documentation for the planned assets.
    b. In the Certificate of disposal list, select **Yes**.

    > **Note:** You must attach disposal documentation and set the **Certificate of disposal** field to **Yes** to mark the Disposal Documentation task as Completed.

    The Disposal Documentation task is marked as **Closed Complete**.

Result

When an asset is sold, on the Asset form, the **State** field value is updated to **Retired**, and the **Substate** field value is updated to **Sold**.

What to do next

When an asset is sold, an expense line is generated for each resold asset. The Amount column value shows the resold value and it's a negative value. To view the expense line created for the resold asset, do the following:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. On the Disposal Documentation task form, select the **Planned Assets** tab.
2. Select the **Asset display name** link.
3. Select the **Expense Lines** tab.

Related topics

Create a disposal order

Perform bulk update of resale value for the assets

Perform bulk update of resale value for the assets

Update the resale values for assets planned for disposal, and indicate that you want to resell them instead of disposing of them, to streamline the asset resale process.

Before you begin

Role required: admin

About this task

Download the list of the planned assets from the Disposal Documentation task and bulk update whether you want to resell or dispose of the assets. For the assets planned for resale, provide the resale value and save it. Import the updated sheet into the Hardware Asset Workspace. After successful import of the resale sheet, on the Disposal Documentation task, in **Planned Asset** tab, the Resold value column data is auto populated. You can proceed with the asset resale for these planned assets.

Procedure

1. Navigate to **All** > *Hardware Asset Workspace* > **Inventory**.
2. Select the **Disposal orders** tab.
3. Select the Number link to open the disposal order record that is in the Documentation stage.
   The Disposal order form is displayed.
4. Select the **Hardware Disposal Tasks** tab.
5. Select the Number link to open the Disposal Documentation task.
   The Disposal Documentation form is displayed.
6. Select the **Planned Assets** tab.
7. Select the **Download disposal assets** button.
   An Excel sheet is downloaded listing the assets planned for disposal.
8. Open the downloaded Excel sheet.
9. Update the column values in the downloaded planned assets for disposal Excel sheet and save it.

   a. In the Substate column, enter **Sold** to resell the asset or **Disposed** to dispose of the asset.

   Note: If an invalid value is entered in the Substate column other than **Sold** or **Disposed**, a validation error is triggered when the updated file is imported to the *Hardware Asset Workspace*.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. In the Resold value column, enter the amount for reselling the asset.

Note:

- When the Substate column value **Sold**, the Resold value column can't be empty, and the amount must be a positive value. If the resold amount is negative or the Resold value column is empty, a validation error occurs when the updated file is imported into the *Hardware Asset Workspace*.
- When the Substate column value is **Disposed**, the Resold value column must be empty.

10. Disposal Documentation form, select **Import**.
11. In the Create New Imported Vendor Data form, do the following:
    - Enter a name for the import vendor data record in the **Name** field,
    - Select the **Attach File** link to attach the updated planned assets for disposal Excel sheet.
    - Select the **Save** button.

    The Vendor data import form is displayed. On the **Details** tab, review the import information. Select the **Vendor Data Import Rows** tab to check if any validations were triggered during the import.

    Note: The Comment column displays the validations triggered during the import of the updated resell asset record sheet. Make the required changes in the planned assets for disposal Excel sheet, and repeat step 10 to import the updated sheet.

12. Select the **Disposal Documentation** tab to open the Disposal Documentation task.
13. Select the **Planned Assets** tab.
    The Resold value and Substate column value show the updated value.

What to do next

On the **Planned Asset** tab, select the assets and proceed with resale. For more information about asset resale, see Resale hardware assets

Related topics

Resale hardware assets

Create a disposal order

Donate assets to charity organizations

Use the Asset Donation flow to donate hardware and consumable assets of your organization to charity organizations.

Create an Asset Donation Order

Create a service catalog request to donate the in-stock hardware and consumable assets in your organization to charity organizations.

Before you begin

Role required: none

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Service Catalog** > **Asset Lifecycle**.
   The Asset Lifecycle category isn't on the Service Catalog page by default. To add this category, select the Add content icon ( ) beside the Search catalog bar and then select **Asset Lifecycle**.

   Note: You require admin role to add a category to the Service Catalog.

2. On the Asset Lifecycle page, select **Asset Donation Order**.
3. On the form, fill in the fields.

Request for asset donation form

Field	Description
Charity organization	Name of the charity organization to which you want to donate your assets. You can filter the charity organization list based on Name, City, State/ Province, Country, or Phone details.
Description	Name and quantity of the assets that you want to donate. For example, `Request to donate two Dell PCs`.

4. Select **Submit**.

   Your Asset Donation Order is successfully submitted.

5. **Optional:** View the status of your Asset Donation Order by navigating to **All** > **Self-Service** > **My Requests**.

Approve or reject an Asset Donation Order

As an asset manager, review and then approve or reject an Asset Donation Order.

Before you begin

Role required: asset

Procedure

1. Navigate to **All** > **Contract** > **My Approvals**.
2. Select an Asset Donation Order record that is in the **Requested** state.
3. Approve or reject the Asset Donation Order.
   - To approve the order, select **Approve.**

     The **State** of the order changes to **Approved**.
   - To reject the order, select **Reject** and enter a reason for rejection in the **Comments** field.

     The **State** of the order changes to **Rejected**.

Process an Asset Donation Order

Process an Asset Donation Order to prepare and send assets to a charity organization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: asset

About this task
You can cancel an Asset Donation Order until it reaches the transit stage in the workflow. After your Asset Donation Order reaches the Confirmation stage, you can't cancel it.

Note: You can process Asset Donation Orders only in Hardware Asset Workspace and not in Hardware Asset Management Core UI.

Procedure
1. Navigate to **All** > **Hardware Asset Workspace** > **Inventory**.
2. Open the **Donation orders** tab.
   A list of asset donation orders is shown.
3. Select an Asset Donation Order that is in the **Scheduling** stage.
4. Add assets to the Asset Donation Order.
   a. Open the **Planned Assets** tab.
   b. Select **Add**.
   c. In the Add assets pop-up window, select assets that are part of the domain whose state is In stock and substate is Pending donation, and then select **Add**.
   Use the filter to search for the desired assets.
   The assets that you added are shown under the Planned Assets tab.
5. Prepare the assets for donation and provide a date to pick up the assets.
   a. Open the **Asset Donation Tasks** tab.
   b. Select the Prepare assets and provide Scheduled date task.
   c. In the Planned Assets related list, select the assets that you want to prepare and then select **Prepare**.

      Note: You can configure subflows for asset preparation tasks based on your needs and the type of assets to be donated. For example, you can configure Prepare asset tasks for a data storage asset that needs data wiping or a hardware asset that needs packaging before it's donated.

      The stage of the planned assets changes to Prepared.
   d. On the Schedule details form, in the **Scheduled date** field, select a date for pick up.
   e. Select **Close task**.
   The state of the task changes to Closed complete, and the Select the assets departing for donation task is created as an asset donation task.
6. Select the assets to be sent.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Open the Select the assets departing for donation task.

b. In the Planned Assets related list, select the assets that you want to send from the stockroom and select **Depart**.
The stage of the planned assets changes from Prepared to In transit. The state of the assets changes to In transit and the Substate changes to Pending donation.

7. Provide the name of the vendor to pick up the assets and the shipment tracking details.

a. Open the Details tab.

b. On the Schedule details form, specify the following:

i. In the **Pickup contact name** field, enter the name of the vendor to pick up the assets for donation.

ii. (Optional) In the **Shipping carrier** field, select your shipping carrier.

iii. (Optional) In the **Tracking number** field, enter the tracking number for the shipment.

Note: The Shipping carrier and Tracking number fields are used to track shipments from the Shipment list in the Asset operations view of the Hardware Asset Workspace. For details, see View hardware asset shipment details.

c. Select **Close task**.
The State of the task changes to Closed complete. Confirmation from the charity organization task is created under the assets donation tasks.

8. Confirm donation of the assets.

a. Select the Confirmation from charity organization task.

b. In the Planned assets related list, select the assets and then select **Confirm Donation**.
The stage of the assets changes to Completed. The state of the assets changes to Retired and the substate changes to Donated.

9. Attach the donation documentation from the charity organization to the Asset Donation Order record.

a. Select the Confirmation from charity organization task.

b. In the Details related list, select the Attachment icon .

c. Select the document.

d. In the Certificate of donation list, select **Yes**.
The state of the Asset Donation Order is set to Completed.

e. Select **Close task**.

Result

All the asset donation tasks are in the Closed Complete state and the Asset Donation Order stage changes to Completed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Calculate the active lifecycle phase for a model

Recalculate the active life cycle phase for a hardware or consumable model without waiting for the scheduled daily job.

Before you begin
Role required: model_manager or asset

About this task
After you normalize hardware and consumable models, the lifecycle phases on the model lifecycle records are marked as inactive, including the current phase that is active. The system corrects this status only after the HAM - Hardware Normalization scheduled job runs, which can take up to 24 hours. Use the **Calculate Lifecycle Phase** option to refresh the lifecycle phase status immediately.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Model management**.
2. Select the model tab.
   - Select **Hardware models** for hardware model records
   - Select **Consumable models** for consumable model records
3. Select the model record.
4. Select the appropriate lifecycle tab.
   - **Hardware Model Lifecycles** tab for hardware model records
   - **Consumable Model Lifecycles** tab for hardware model records
5. Select **Calculate Lifecycle Phase**.

Result
The system recalculates and identifies the correct active lifecycle phase, updating the current_lifecycle_phase flag to true for that phase while marking all other phases as inactive.

Manage asset bundles from your inventory

Create asset bundles from existing assets in your inventory to track, reserve, or deploy a group of assets as a single entity.

Before you begin
An asset bundle is a grouping of assets and comprises of consumable and hardware assets. Only assets that are in the **In stock** status and **available** substatus are added to an asset bundle. Assets that are part of an asset bundle aren't available as individual assets.

Note: For information on asset bundles, see Asset bundles.

Role required: asset

Procedure

1. Navigate to **All** > **Asset** > **Bundled Assets**.
2. Select **New**.
   The model category defaults to **Bundle** and the state defaults to **Build**. The build state is associated to only the **Bundle** model category. The build state isn't valid for assets.
3. In the Bundle form layout, select a product model from the **Model** list.
4. In the **Stockroom** field, select a stockroom from where the assets are sourced for the bundle.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Automatically add assets to your bundle by selecting **Auto-allocate assets** or add specific assets by selecting **Select assets**:
   - **Auto-select assets**: Automatically adds assets to the asset bundle. The assets are added from the stockroom specified in the asset bundle.

     Note: Assets are allocated only when all the assets that are part of the bundle are available. Excluded assets aren't considered for auto-selection. For more information about asset exclusion, see Hardware Asset Management license exclusion.

   - **Select assets**: Select the assets that you want in your asset bundle and select **Add Assets**.

     Note:

     You can't select an excluded asset. For more information about asset exclusion, see Hardware Asset Management license exclusion. Assets displayed are confined to the stockroom specified in the asset bundle.

   Once the assets are allocated to the bundle, the assets appear in the Assets related list and **Auto-allocate assets** and **Select assets** no longer appear in the Bundle form layout.

   Note: You must include all the assets to the asset bundle that are associated with the bundled model as a model component. If any asset isn't included, the bundle asset is considered incomplete, and the **State** field value of the bundle asset can't be changed.

6. Select **Save**.
   The asset bundle is created. The cost of the bundled model is stamped on the asset bundle and on the expense line of the asset bundle. The cost isn't the cumulative cost of all the model components of the bundled model.
7. You can swap assets from an asset bundle by selecting **Replace assets**.
   Assets belonging to an asset bundle can be swapped when the state of the bundle is **In maintenance** or **In stock** (substate **Pending repair**).

   a. In the Replace assets dialog box, select the assets you want to swap.

   b. Select the asset that you want to swap the current asset with.

   c. Select **Replace**.
      The asset that was swapped is returned to the stockroom.

8. You can delete an asset bundle by selecting **Delete**.
   You must disassociate assets from an asset bundle to delete the bundle. Once all the assets are released from the bundle, you can delete the bundle.

   a. In the **State** field, select **Retired**.

   b. Select **Save**.

   c. Select the **Release Assets** related link.

   d. In the confirmation dialog box, select **Release assets**.
      All the assets are disassociated from the asset bundle and are moved to a stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. Select **Delete**.
The asset bundle is deleted.

Manage obligations in the Hardware Asset Workspace

Obligation Management in the Hardware Asset Workspace enables you to create obligation records to define specific instructions and obligation task types required to fulfill a contract obligation.

Hardware contracts such as leases, warranties, maintenance agreements, and purchase agreements each include specific commitments. Without proper tracking, organizations risk:

- Missing renewal deadlines
- Failing to verify vendor service level performance
- Paying for repairs covered under warranty
- Incurring penalties from missed purchase obligations

With Obligation Management in the Hardware Asset Workspace, contract managers can create, assign, and complete contractual obligations from a single workspace. For details, see Hardware Asset Management integration with Contract Management Pro.

Note: You can also use the Manage contract repository agentic workflow to extract obligations from signed contracts and create obligation records automatically. For more details, see Initiate metadata and obligation extraction from a signed contract in the Hardware Asset Workspace and Review AI-extracted obligations in the Hardware Asset Workspace.

Obligation task types

Ad hoc obligation task

An obligation task that is required only once or at irregular intervals to fulfill the contract obligations.

Recurring obligation task

An obligation task that is required at regular intervals to fulfill contract obligations. Recurring obligation tasks are created automatically based on the defined schedule. When you select this task type, the **Frequency** and **Lead time** fields appear on the obligation task record. The lead time determines how many days before the due date each task is created.

Roles

The following roles support Obligation Management in the Hardware Asset Workspace.

Roles required

Role	Description
sn_cm_obligation.obligation_admin	Provides administrative access to Obligation Management and underlying data.
sn_cm_obligation.obligation_fulfiller	Creates obligations and approves, rejects, or cancels obligation tasks within the Hardware Asset Workspace.
sn_cm_obligation.obligation_user	Acts on the assigned obligation task and submits the task within Hardware Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Obligation Management workflow

The following workflow describes how users create and manage obligations for hardware contracts.

1. A user with the sn_cm_obligation.obligation_fulfiller role creates an obligation record on a hardware contract, specifying the obligation name, category, assignee, dates, instructions, and task type.
2. The user with the sn_cm_obligation.obligation_fulfiller role also creates one or more obligation tasks. Each task inherits fields from the parent obligation record and requires a due date that falls within the obligation start and end dates.
3. When an obligation task is saved, the system sends an email notification to the assigned user with the sn_cm_obligation.obligation_user role.
4. The assigned user reviews and submits the obligation task in the Employee Center. The obligation task moves to the **Awaiting Approval** state. For more information, see Create obligations manually.
5. The approver with the sn_cm_obligation.obligation_fulfiller role reviews and approves the task. For more information, see Approve or reject obligation tasks.
6. After approval, the obligation task moves to the **Closed Complete** state.

Create an obligation record in the Hardware Asset Workspace

Create an obligation record for signed contracts in the Hardware Asset Workspace to fulfill the responsibilities specified in the contract through obligation tasks.

Before you begin

The contract record must be in the **Active** state.

Role required: sn_cm_obligation.obligation_fulfiller

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Contract management**.
2. Select the tab for the contract type for which you want to create an obligation.
   - **Leases**
   - **Maintenance**
   - **Warranties**
   - **Purchasing agreements**
3. Select the active contract record.
4. Select the **Obligations** tab.
5. Select **New**.
6. On the form, fill in the fields.
   For a description of the field values, see Obligation form.
7. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- An obligation record is created for the contract and listed in the **Obligations** tab.

  Note: The obligation record is saved in the Obligations [sn_cm_obligation_obligation] table.

- The obligation record also appears under **Contracts** > **Obligations** in the Asset Operations view.

What to do next

Create an obligation task for the obligation record. For details, see Create an ad hoc obligation task in Hardware Asset Workspace.

Related topics

Create obligations manually

Approve or reject obligation tasks

Cancel an obligation task

Create an ad hoc obligation task in Hardware Asset Workspace

Create an ad hoc obligation task required only once or at irregular intervals to track and fulfill an obligation specified in a contract.

Before you begin

Role required: sn_cm_obligation.obligation_fulfiller

Procedure

1. Open an active obligation record.

Hardware Asset Workspace view	Steps
Contract management	**a.** Navigate to **Workspaces** > **Hardware Asset Workspace** > **Contract management**. **b.** Select the **All contracts** tab. **c.** Select an active contract record. **Note:** Obligation is associated with the following contract types: ▪ Leases ▪ Warranties ▪ Maintenance ▪ Purchasing agreements **d.** Select the **Obligations** tab. **e.** Select an active obligation record.
Asset operations	**a.** Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations**. **b.** From the Contracts list, select **Obligations**. **c.** Select an active obligation record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Select the **Obligation tasks** tab.
3. Select **New**.
4. On the New obligation task form, fill in the required details.
   a. In the **Assigned to** field, update the assigned user.
   b. In the Schedule section, select the task completion date in the **Due date** field.
   c. Select **Save**.

Result

- An obligation task record is created and listed in the **Obligations tasks** tab.

  Note: The obligation task record is saved in the Obligation Tasks [sn_cm_obligation_obligation_task] table.

- The obligation task also appears under **Contracts** > **Obligations tasks** in the Asset Operations view.
- The system notifies the assigned user through email.

Related topics

Create obligations manually

Approve or reject obligation tasks

Cancel an obligation task

Manage contract repository agentic workflow in the Hardware Asset Workspace

Automate contract management with the Manage contract repository agentic workflow. Extract metadata and obligations from signed contracts and set renewal or termination reminders automatically to reduce manual data entry and help legal and procurement teams maintain compliance.

Overview of Manage contract repository agentic workflow

The manage contract repository agentic workflow uses an AI agent to perform the following steps sequentially:

1. Extract metadata from signed contracts.
2. Calculate the contract reminder date for renewal and termination.
3. Extract obligations from signed contracts.

Metadata extraction and contract reminders

The AI agent uses the Contract metadata extraction skill to extract key metadata from signed contracts. After the metadata extraction is complete, you can open the playbook to review the extracted information and set the contract reminder date.

The following workflow explains the metadata extraction and contract reminder setup process:

1. As a Contract admin with the AI role (sn_cm_gen_ai.ai_contract_config), activate the Contract metadata extraction skill in the AI Admin Hub console.

   For more information, see Configure the Manage contract repository agentic workflow for HAM.

2. In the Contract management view of the Hardware Asset Workspace, create a contract record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the contract record, upload a signed contract file and select **Initiate contract extraction**.
4. After contract metadata and reminders extraction is complete, a message appears on the contract form indicating that the metadata is ready for review. If notifications are enabled by the administrator, the Contract Manager also receives an email notification. For more information, see Enable notifications for AI extracted metadata and obligations.
5. The Contract Manager reviews the extracted metadata and submits it to update the contract.
6. The contract reminder date is then calculated based on the following factors:
   - Contract end date
   - Presence of auto-renewal clause
   - Notice period for contract renewal or termination

   Note: If the renewal notice period and termination notice period aren't available, the configured default notice period is used. For more information, see Set the default notice period for the Manage contract repository agentic workflow.
7. The Contract Manager sets the contract reminders in the playbook by reviewing the calculated date and configuring the recipient list for the reminders.

For more information, see Review AI-extracted metadata and contract reminder date in the Hardware Asset Workspace.

Obligation extraction

The AI agent uses the Contract obligation extraction skill to extract key contractual obligations from contracts. Once extracted, you can review the obligations within the contract playbook and choose to accept or reject them. Accepted obligations are added as records in the **Obligations** tab of the contract record.

The following workflow explains the obligation extraction process:

1. As a Contract admin with the AI role (sn_cm_gen_ai.ai_contract_config), activate the contract obligation extraction skill in the AI Admin Hub console.

   For more information, see Configure the Manage contract repository agentic workflow for HAM.
2. In the Contract management view of the Hardware Asset Workspace, create a contract record.
3. On the contract record, upload a signed contract file and select **Initiate contract extraction**.
4. After the obligation extraction is complete, a message appears on the contract form indicating that the obligations are ready for review. If notifications are enabled by the administrator, the Contract Manager also receives an email notification. For more information, see Enable notifications for AI extracted metadata and obligations.
5. The Contract Manager reviews the extracted obligations within the contract playbook. Each obligation can be accepted or rejected based on relevance.
6. Approved obligations are automatically added as obligation records in the **Obligations** tab of the contract record.
7. Obligation tasks are created.
   - For a recurring schedule, the obligation tasks are automatically created for the obligation record based on the defined schedule.
   - For an ad hoc schedule, the user with the sn_cm_obligation.obligation_fulfiller role creates an obligation task. For details, see Create an ad hoc obligation task in Hardware Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. The assigned user with the sn_cm_obligation.obligation_user role is notified when the obligation task is created.
9. The assigned user works on the obligation task and submits it for review.

   The state of the obligation task changes from Open to Awaiting approval. For more details, see Create obligations manually.
10. The user with the sn_cm_obligation.obligation_fulfiller role reviews the task and approves or rejects it. For more information, see Approve or reject obligation tasks.
    - If the obligation task is rejected, the state of the task changes to Open, and the assigned user continues to work on it.
    - If the obligation task is approved, the state of the task changes to Completed.

For more information, see Review AI-extracted obligations in the Hardware Asset Workspace.

Conditions for initiating extraction from the contract file

When a hardware contract is created, the **Initiate contract extraction** button appears on the contract form when the following conditions are met:

- The contract metadata extraction skill or the contract obligation extraction skill is activated on your ServiceNow instance.
- One or both extraction skills have not yet been executed on the contract record.
- The contract type is warranty, maintenance, lease, or purchase agreements.

Note: If both the contract metadata extraction skill and the contract obligation extraction skill have already been executed on the contract record, the **Initiate contract extraction** button does not appear on the contract form.

AI agents used in the manage contract repository agentic workflow

AI agents names and descriptions

Name	Description
Contract repository AI agent	• Retrieves contract repository details, such as vendor, model, and document attachment ID, from a specific contract repository record. • Extracts metadata from signed contract documents based on the applicable use case in the contract metadata extraction skill. • Extracts obligations from signed contract documents based on the applicable use case in the contract obligation extraction skill. • Calculates the average lead time for similar contracts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Hardware Asset Management integration with Contract Management Pro

Initiate metadata and obligation extraction from a signed contract in the Hardware Asset Workspace

Reduce manual effort by using the Manage contract repository agentic workflow to extract key metadata and obligations from an uploaded signed contract and calculate the contract reminder date.

Before you begin

For the **Initiate contract extraction** button to appear on the contract form, the following conditions must be met:

- The Contract metadata extraction skill or the Contract obligation extraction skill is activated on your ServiceNow instance.
- One or both extraction skills have not yet been executed on the contract record.
- The contract type is warranty, maintenance, lease, or purchase agreements.

Role required: contract_manager, sn_cm_gen_ai.ai_contract_fulfiller, and now_assist_panel_user

About this task

Use the Manage contract repository agentic workflow to extract metadata and key contractual obligations from signed contracts. After extraction, the information is mapped to the appropriate fields in the hardware contract record. Review the accuracy of the extracted information and make necessary corrections to the extracted field values as required.

Procedure

1. Navigate to **Workspaces** > *Hardware Asset Workspace* > **Contract management**.
2. Select **New contract**.
3. On the Create New Contract form, fill in the required **Contract model** and **Contract number** field values.
   For a description of the field values, see Create a contract.
4. Select **Save**.
   The **Initiate contract extraction** button is displayed.
5. Select the Attachments icon  .
6. In the Attachments section, select **Select Files**.
7. Select the signed contract file.
8. In the Upload a file dialog box, select **Upload**.
   The uploaded file is displayed in the Attachments section.
9. Select **Initiate contract extraction** and select one of these options in the confirmation message:
   - To mark your confirmation and proceed with metadata extraction from signed contract, select **OK**.
   - To dismiss the metadata extraction from signed contract, select **Cancel**.

   After you confirm and proceed with metadata extraction, a confirmation message appears indicating metadata extraction initiated for the signed contract.

Result

After metadata extraction is completed, a confirmation message appears on the contract form and the **Playbook** tab is displayed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

Review the extracted metadata, contract reminder date, and obligation records. For more information, see Review AI-extracted metadata and contract reminder date in the Hardware Asset Workspace and Review AI-extracted obligations in the Hardware Asset Workspace.

Review AI-extracted metadata and contract reminder date in the Hardware Asset Workspace

Use the contract playbook to review and update the AI-extracted metadata and contract reminder date.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_fulfiller, ham_admin/ham_user, sn_cm_gen_ai.ai_contract_config, and now_assist_panel_user

About this task

The Manage contract repository agentic workflow uses AI agents to extract key metadata from signed contracts and calculate contract reminder date. The metadata is extracted based on the applicable use case in the Contract metadata extraction skill. After the extraction process is complete, a message appears on the contract record and an email notification is sent with a link to review the extracted metadata. Once you have reviewed and submitted the extracted metadata, the contract reminder date is calculated. The reminder date is calculated based on the contract end date, auto-renewal clause, and notice period for contract renewal or termination.

To receive notifications when AI agents complete metadata extraction, verify that notifications are enabled by the administrator. For more information, see Enable notifications for AI extracted metadata and obligations.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Contract management**.
2. Select the **All contracts** tab.
3. Select a contract record for which you want to review the extracted metadata.
4. Select the **Playbook** tab.
5. In the playbook, under the AI extracted metadata section, select **Extracted metadata**.
   The playbook displays the Extracted metadata section with a review overview showing the number of fields yet to review and reviewed.
6. Select **Review metadata**.
   The **Review Metadata** page opens, displaying the signed contract document on the left and the **Extracted data** panel on the right. Fields that could not be extracted are tagged **Missing in the document**.
7. Review each field in the Extracted data panel and mark it as reviewed using one of the following methods:
   - To update a field value:
     a. Select the Edit icon next to the field to open it for editing.
     b. Enter the correct value in the field.

        If the value is not available in the contract document, select the **Answer is missing in the document** check box.

     c. Select **Save**.

        A tick appears on the button, indicating the field is reviewed.
   - To accept the extracted value without editing:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Select the **Click to mark as reviewed** button next to the field.

A tick appears on the button, indicating the field is reviewed. Use the **To review** tab to track fields that still require review. The count updates as you mark each field.

8. After reviewing all fields, select **Submit**.

   The **Confirm field predictions** dialog box appears, prompting you to confirm that you have reviewed all fields for accuracy before submitting.

9. In the dialog box, select one of the following options:
   - To go back and review remaining fields, select **Review**.
   - To confirm and submit the reviewed metadata, select **Confirm and Submit**.
   - The extracted and reviewed metadata is added to the mapped fields in the hardware contract.
   - In the Playbook tab, the status of the Extracted metadata section updates to Complete.
10. Select the **Playbook** tab.
11. Under Review contract reminders, select **Contract reminder date**.
12. Review the **Reminder date** field.
    - If the signed contract contains the contract end date, auto-renewal clause, and notice period, the AI agent calculates and populates the reminder date. To understand how the date was calculated, select **Show AI reasoning** to view the breakdown. Modify the date if needed.
    - If any of these values are missing from the signed contract, the reminder date can't be calculated automatically. Enter the reminder date manually in the **Reminder date** field.
13. Select **Mark as complete**.
    The Contract reminder recipients page opens, displaying the list of users who are already configured as recipients for the contract reminder.
14. Configure the recipient list.
    - To add a recipient, select **Add**. In the **Add recipients** dialog box, select a user and then select **Add**.
    - To remove a recipient, select the check box next to the user name and select **Remove**.

      Note: You must add at least one user as a recipient.
15. Select **Mark as complete**.
    The contract reminder date is saved, and the configured recipient receives a notification on the specified date to remind them of upcoming contract renewal or termination actions.

Review AI-extracted obligations in the Hardware Asset Workspace

Use the contract playbook to review, edit, approve, or reject obligations automatically extracted from contract documents.

Before you begin
Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

The Manage contract repository agentic workflow uses AI agents to extract key contractual obligations from signed contracts. The obligations are extracted based on the applicable use case in the Contract obligation extraction AI skill. After obligation extraction is complete, a message appears on the contract record and an email notification is sent with a link to review the extracted obligations. The playbook provides a step-by-step interface where you can review each obligation, make necessary edits, and decide whether to approve or reject it. Approved obligations are added as actionable records in the **Obligations** tab of the of the contract record.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Contract management**.
2. Select the **All contracts** tab.
3. Select a contract record for which you want to review the extracted obligation record.
4. Select the **Playbook** tab.
   The playbook opens, displaying a step-by-step interface to review the extracted obligations.
5. In the playbook, under the AI extracted obligations section, expand **Review extracted obligations**.
6. Select **Review obligations**.
7. On the Review obligations page, select **Review**.
   The extracted obligations are displayed on a new tab.
8. Select an obligation to review the obligation details.
   - The **Details** tab displays the extracted obligation details. Use this tab to edit, approve, or reject the obligation.
   - The **Activity** tab displays a log of key attributes identified during the extraction process. Use this tab to review how the AI agent detected and populated the obligation, including the original text snippets and metadata extracted from the contract. The **Activity** tab helps you validate the extraction accuracy and provides transparency into the decision-making process for each obligation.
9. On the **Details** tab, perform the required action.
   - Edit the obligation details as needed.

     Note: Complete all required fields before saving the changes or approving the obligation.

     For a description of the field values, see Obligation form.
   - To save the changes, select **Save**.
   - To approve the extracted obligation and add it as a record in the contract repository, select **Approve**.
   - To reject the extracted obligation, select **Reject**.

     After an obligation is rejected, it's deactivated and can't be reactivated again. To add an obligation later, you must create an obligation record manually. For more information, see Create an obligation record in the Hardware Asset Workspace.
10. Repeat step 9 for all the extracted information.
11. Select the **Playbook** tab.
12. Select **Mark as completed**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- Approved obligations are listed under the **Obligations** tab of the contract record.
- Rejected obligations are deactivated and excluded from further processing.
- For obligations with recurring schedule, the obligation tasks are automatically created based on the interval specified in the **Repeats** field.

What to do next

For obligations with an ad hoc schedule, create obligation tasks manually. For more information, see Create an ad hoc obligation task in Hardware Asset Workspace.

Attestation and conformance

Audit hardware asset assignments using attestation and manage HAM subscriptions to maintain accurate and conforming asset records.

Perform these tasks as needed to maintain compliance in HAM.

Task details

Task	Description
Manage Hardware Asset Management subscriptions	View details of the subscriptions purchased and consumed by your organization for the resource categories that you have opted in.
Audit your hardware assets by using Asset Attestation	Audit hardware assets assigned to your employees and validate whether they are using those assets.

Manage Hardware Asset Management subscriptions

Save on Hardware Asset Management licensing cost by choosing only the Hardware Asset Management Resource Categories that you use.

For details on Hardware Asset Management licensing, see Hardware Asset Management subscription.

View the license report for the Hardware Asset Management application

View details of the subscriptions purchased and consumed by your organization for the managed IT resource types such as Server, End User Computing Device, Networking Device, Mobile Device, and Telecom Network Inventory using the ITAM License Report.

Before you begin

Role required: admin, usage_admin

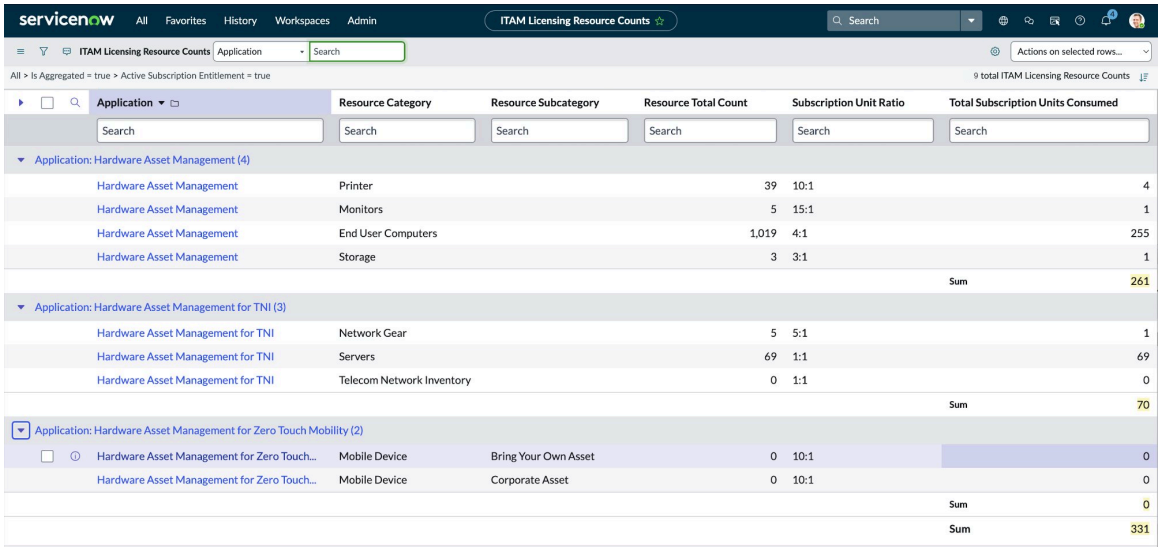
About this task

Note: Every week on Sunday, the license count for the managed IT resource types is calculated. Any changes to the license consumption reflect on the ITAM license report only after the weekly license count calculation.

Procedure

1. Navigate to **All** > **ITAM Licensing** > **ITAM License Report**.
2. Search for the Hardware Asset Management application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Subscription details of all the Hardware Asset Management applications activated on your ServiceNow instance are shown.

You can view the following information on subscriptions purchased for the resource categories that you opted-in for all the Hardware Asset Management applications:

- **Application**: Name of the application that is activated on your ServiceNow instance. The ITAM License Report is grouped by the application.
- **Resource Category**: Managed IT resource types available for the Hardware Asset Management application. The resource types include the following:
  - Server
  - End User Computers
  - Network gear
  - Mobile Device
  - Telecom Network Inventory
  - Printers
  - Monitors
  - Storage
  - Unclassified hardware

  Note the following:
  - Printers, Monitors, Storage, and Unclassified hardware are available with Hardware Asset Management version 10.1.0 and later.
  - When more than one Hardware Asset Management solution is activated on your ServiceNow instance, an opted-in resource category that is available with the activated solutions is licensed only under solution. For more details, see Licensing framework for Hardware Asset Management solutions.
- **Resource Subcategory**: Subcategories of a Resource category.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

- Resource Subcategory is available with Hardware Asset Management version 10.1.0 and later.
- Based on the acquisition method, the following resource subcategories are available for the Mobile Device only when the Hardware Asset Management integration with Zero Touch Mobility is activated on your ServiceNow instance:
  - Bring Your Own Asset
  - Corporate Asset

- **Resource Total Count**: Asset count of the managed IT resources that is grouped by Resource categories and Model categories.
- **Subscription Unit Ratio**: Predefined ratios that determine how many assets of a Resource category require a subscription. For example, the defined ratio of 4:1 for End User Computers means that every four assets of that resource category require one Subscription Unit.
- **Total Subscription Units Consumed**: The number of subscriptions per Resource category that your organization consumed. The licensing module calculates this number by applying the Subscription Unit Ratio to the Resource Total Count for each Resource Category.

Audit your hardware assets by using Asset Attestation

Improve the asset utilization by auditing the hardware assets assigned to your employees and validating if the employees are using the assigned assets.

As an Asset manager or an Inventory administrator, you can create an asset attestation in any of the following ways:

- Create an asset attestation or a schedule using the playbook
- Create an asset attestation in the Inventory view.
- Create an asset attestation schedule.
- Create an attestation for a hardware asset

Important: Starting with Hardware Asset Management version 13.0.0, the playbook is the default option for the creation of asset attestations and schedules. However, if you set the value of the *sn_itam_common.enable_asset_attestation_playbook* system property to **false** with the asset or inventory_admin role, you will be shown forms to complete the attestation process instead of the playbook.

As an employee, you can confirm the assets assigned to you in any of the following ways:

- Confirm the assigned assets using the Now Mobile app.
- Confirm the assigned assets on the Employee Center portal.

For more details, see Asset Attestation.

Playbook for asset attestation

The Create asset attestation playbook provides detailed, step-by-step instructions for creating an asset attestation. This playbook guides you through each stage of the attestation process, starting from filling in the asset attestation details to the completion of attestation.

The Create asset attestation playbook includes multiple lanes on the left-hand pane, each corresponding to the different activities in the asset attestation process. Each lane includes status indicators that display the current state of each activity.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After you mark an activity in a lane as complete, you can move on to the next lane. You can return to the playbook anytime later to finish any pending activities. As you complete each lane, the status updates in the left-hand panel. The final activity in the playbook involves reviewing the attestation schedule details that you provided and marking that activity as complete.

Create an asset attestation or a schedule using the playbook

Create a one-time asset attestation or a schedule for recurring attestations to verify if your serialized hardware assets are in use, using the playbook.

Before you begin

Role required: asset or inventory_admin

About this task

A single asset attestation can have attestations involving more than one employee. Also, an employee can have more than one asset assigned. Therefore, an asset attestation can have multiple users and assets involved.

Only serialized hardware assets that belong to the opted-in resource categories can be requested for attestation. Consumables, bundles, and pallets can't be attested.

The *ITAM Common- Asset attestation* daily job runs daily to check through all the attestation schedules that are created. Based on the frequency specified in the attestation schedule, the job creates an asset attestation.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Asset attestations** tab.
3. Select **New**.
   The Create asset attestation playbook displays the following activities that you must complete in the sequence:
   - **Provide attestation details**
   - **Select users**
   - **Select model categories**
   - **Attestation completed**
4. Select whether you want to create an asset attestation or an attestation schedule, and then fill in the necessary details in the **Provide attestation details** activity.

   The **Schedule number** field is automatically populated with a unique identifier for the attestation schedule.

   - To create an asset attestation, select **One-time** in the Mode field and follow these steps:
     a. In the **Schedule name** field, enter the name of the attestation.
     b. Select **Mark Complete**.
   - To create a schedule for recurring asset attestations, select **Recurring** in the Mode field and follow these steps:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the form, fill in the fields.

Provide attestation details form

Field	Description
Schedule name	Name of the asset attestation schedule.
Frequency (days)	Frequency in days when the asset attestation schedule must create an asset attestation.
Schedule start date	Date on which the attestation schedule should be processed for the first time to create an asset attestation. **Note:** The Schedule start date must be at least the current date and can't be in the past.
Schedule end date	Date on which the attestation schedule should be processed for the last time to create an asset attestation. **Note:** The Schedule end date should be after the schedule start date.

b. Select **Mark Complete**.

5. In the **Select users** activity, select employees required to confirm assets.

a. In the Editor section, set a condition to select employees who are required to confirm assets through the asset attestation request.
For example, to select employees in the Development department, set the **Department** field to **Development**.
The **User list** section displays the number of records that match your condition. You can also view these results.

b. Select **Mark Complete**.

6. In the **Select model category** activity, select the model categories of assets that you want to attest.

Number of model categories to be attested	Action
All	**a.** In the **Model category type** field, select **All**. **b.** Select **Mark complete**.
A few model categories from the list	**a.** In the **Model category type** field, select **In dividual**. **b.** In the **Model categories** field, select the re quired model categories.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Number of model categories to be attested	Action
	Note: You can select one or more model categories. **c.** Select **Mark complete**.

7. In the **Attestation completed** activity, review the details on the Attestation schedule overview form, and then select **Mark Complete**.

Result

- If you selected **One-time** in the Mode field, the following changes happen:
  - An email notification is sent to the employees who are required to confirm assets. Employees can confirm assets through the Now Mobile app or on the Employee Center portal.
  - An asset attestation is created in the In progress state and the following tabs are displayed:
    - The Assets tab shows the list of assets to be confirmed by the employees.
    - The Users tab shows the list of employees who are required to confirm the assets assigned to them.
    - The Excluded Assets tab shows the assets that are opted-out and not part of the asset attestation.
    - The Remediation task tab displays any remediation tasks created for assets that your employees have confirmed they don't have.
- If you selected **Recurring** in the Mode field, and set the **Schedule start date** field to a date in future, the following changes happen:
  - An asset attestation schedule is created in the Ready state.
  - The Attestations tab displays the list of attestation request details after the requests are created.
  - An email notification is sent to the employees who are required to confirm assets on the scheduled attestation date. Employees can confirm assets through the Now Mobile app or on the Employee Center portal.
- If the **Schedule start date** field is set to the current date, the following changes happen:
  - An attestation schedule is created in the Ready state.
  - The attestation schedule creates an asset attestation in the In progress state.
  - An email notification is sent to the employees who are required to confirm assets. Employees can confirm assets through the Now Mobile app or on the Employee Center portal.

What to do next

View the asset attestation or the attestation schedule that's created.

- To view the attestation record, follow any of these steps:
  - Navigate to the **Inventory** view and select the **Asset attestations** tab
  - Navigate to the **Asset operations** view and select **Attestations** from the Attestation list.
- To view the attestation schedule record, navigate to **Asset operations** and select **Schedule** from the Attestation list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Return to the playbook to continue pending asset attestation activities

Resume work on the incomplete asset attestation activities in the playbook by using the attestation schedule details.

Before you begin
Role required: asset or inventory_admin

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations**.
2. From the Attestation list, select **Schedule**.
3. From the list of schedules, select the one where you have incomplete activities in the playbook.
4. Select **Continue on playbook**.

Result
The Create asset attestation playbook is displayed for the schedule number that you selected.

What to do next
Complete all the pending activities in the playbook. For details, see Create an asset attestation or a schedule using the playbook.

Create an asset attestation in the Inventory view

Create an asset attestation to validate whether the serialized hardware asset that's assigned to an employee is still in use.

Before you begin
Role required: asset or inventory_admin

About this task
A single asset attestation can have attestations involving more than one employee. Also, an employee can have more than one asset assigned. Therefore, an asset attestation can have multiple users and assets involved.

Only serialized hardware assets that belong to the opted-in resource categories can be requested for attestation. Consumables, bundles, and pallets can't be attested.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Asset attestations** tab.
3. Select **New**.
4. In the dialog box, under the **Attestation mode**, select **One time**.
5. Select **Create**.
6. On the form, fill in the fields.

Create New Attestation form

Field	Description
Asset details	
Attestation number	Unique identifier for asset attestation.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Requested by	User who is creating the asset attestation.
Submission date	Date on which the asset attestation is submitted.
Schedule	Attestation schedule that created the attestation. **Note:** This field is empty for a one-time asset attestation request.
State	Status of the asset attestation.
Model categories	Model categories of the assets for which the attestation is requested. **Note:** You can select more than one model categories. However, you can only select the model categories that belong to the resources categories that are opted-in and that don't need a license.
User Criteria	
Filter	Set conditions to select employees who are required to confirm assets. For example, if you want to select employees who belong to the Development department, you can set the **Department** field to **Development** and then select **Set**.
Work notes	
Work notes	Comments related to asset attestation.

Note: The following fields on the form are automatically populated:

- **Attestation number**
- **Requested by**
- **Submission date**
- **Schedule**
- **State**

7. Select **Save**.

Result

- An email notification with the link to the **My Assets** page on the Employee Center portal is sent to the employees who are required to confirm assets.
- An asset attestation is created in the In progress state.
- The Assets tab shows the list of assets to be confirmed by the employees.
- The Users tab shows the list of employees who are required to confirm the assets assigned to them.
- The Excluded Assets tab shows the assets that are opted-out and not part of the asset attestation.

What to do next

View open asset attestations in the Hardware Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create an asset attestation schedule

Create an attestation schedule so that recurring asset attestations are created based on the frequency that you specify.

Before you begin

Role required: asset or inventory_admin

About this task

The *ITAM Common- Asset attestation* daily job runs daily to check through all the attestation schedules that are created. Based on the frequency specified in the attestation schedule, the job creates an asset attestation.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Asset attestations** tab.
3. Select **New**.
4. In the dialog box, under the **Attestation mode**, select **Recurrence**.
5. Select **Create**.
6. On the form, fill in the fields.

Create New Asset attestation schedule form

Field	Description
Attestation schedule details	
Schedule number	Unique identifier for the attestation schedule.
Schedule name	Name of the asset attestation schedule.
Frequency (days)	Frequency in days when the asset attestation schedule must create an asset attestation.
State	Status of the asset attestation schedule.
Schedule start date	Date on which the attestation schedule should be processed for the first time to create an asset attestation. **Note:** The Schedule start date must be at least the current date and can't be in the past.
Schedule end date	Date on which the attestation schedule should be processed for the last time to create an asset attestation. **Note:** The Schedule end date should be after the schedule start date.
Requested by	User who is creating the attestation schedule.
Next scheduled run	Date on which the attestation schedule is planned to be run the next time. This field is updated automatically only after the asset attestation schedule is processed successfully to create an asset attestation. Also, this field is populated based on the value in the **Frequency (days)** field. For example, if the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Schedule start date is set to `2024-01-01` and the Frequency is set to `10`, then the following events happen: **a.** An asset attestation is first created on 2024-01-01. **b.** The Next scheduled run field is set to 2024-01-11 automatically.
Model categories	Model categories of the assets for which the attestation schedule is created. **Note:** You can select more than one model categories. However, you can only select the model categories that belong to the resources categories that are opted-in and that don't need a license.
User Criteria	
Filter	Set conditions to select employees who are required to confirm assets through the asset attestation request. For example, if you want to select employees who belong to Development department, you can set the **Department** field to **Development** and then select **Set**.
Work notes	
Work notes	Comments related to the asset attestation schedule.

Note: The following fields on the form are automatically populated:

- **Schedule number**
- **State**
- **Requested by**
- **Next schedule run**

7. Select **Save**.

Result

- An asset attestation schedule is created in the Ready state.
- The Attestations tab displays the list of attestation request details after the requests are created.
- An email notification with the link to the **My Assets** page on the Employee Center portal is sent to the employees who are required to confirm assets on the scheduled attestation date.

What to do next

View open asset attestations in the Hardware Asset Workspace.

Create an attestation for a hardware asset

Validate a particular serialized hardware asset by creating an attestation for that asset.

Before you begin

Role required: asset or inventory_admin

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset Estate**.
2. Select the **Hardware assets** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select the asset that you want to attest.
4. Select the More Options icon (•••) on the asset form.
5. Select **Create attestation**.
   An attestation is created for the asset.
6. **Optional:** View the asset attestation record details.
   a. Navigate to the **Asset operations** view.
   b. From the Attestation list, select **Attestations**.
   c. Select the attestation record.

View attestations for a serialized hardware asset

View all the attestation records associated with a serialized hardware asset to check the status of previous asset attestations.

Before you begin

Role required: asset or inventory_admin

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset estate**.
2. Select the **Hardware assets** tab.
3. Select the asset for which you want to view the list of attestations.
4. From the contextual side bar of the asset form, select the AssetLifeCycle icon  .
   All the asset lifecycle events are shown.
5. In the **Attestation** card, select **View records**.
   The list of all attestations created for that asset is shown with the following details:
   - **Attestation number**
   - **Status**
   - **User**
   - **Attestation date**

View open asset attestations in the Hardware Asset Workspace

Get the details of all asset attestations that are awaiting action from your employees in the Hardware Asset Workspace.

Before you begin

Role required: asset or inventory_admin

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Overview** tab.
   In the Inventory overview section, the **Open asset attestations** card shows the number of open attestations.
3. On the Open asset attestations card, select **View records** to view the list of attestations that need action from your employees.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The list of asset attestations with **Status** as **Open** is displayed.

Cancel an asset attestation

Cancel an asset attestation when you no longer have to validate the ownership of the serialized assets.

Before you begin
Role required: asset or inventory_admin

About this task
An asset attestation that's in the In progress state can only be canceled.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Attestation** list, select **Attestations**.
   The list of all asset attestations that are in the In progress, Closed complete, or Canceled state is displayed.
3. Select an attestation record that's in the In progress state.
4. Select **Cancel attestation**.
5. In the Confirmation dialog box, select **Yes**.

Result

- The state of the asset attestation changes to Canceled.
- The status of the assets in the asset attestation that aren't confirmed by the employees' changes from Open to Canceled.

Cancel an attestation schedule

Cancel an attestation schedule when you no longer want to create recurring asset attestations.

Before you begin
Role required: asset or inventory_admin

About this task
You can only cancel an asset attestation schedule that's in the Ready or In progress state. When you cancel the attestation schedule, the associated asset attestations that are in the In progress state aren't canceled. However, new asset attestations aren't created.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations**.
2. From the **Attestation** list, select **Schedules**.
   The list of all attestation schedules that are in the Ready, In progress, Closed complete, or Canceled state is displayed.
3. Select an attestation schedule record that's in the Ready or In progress state.
4. Select **Cancel schedule**.
5. In the **Confirmation** dialog box, select **Yes**.

Result
The state of the attestation schedule changes to Canceled.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View open remediation tasks for asset attestations in the Hardware Asset Workspace

Get the details of all the remediation tasks for asset attestations that are awaiting your action in the Hardware Asset Workspace.

Before you begin
Role required: asset or inventory_admin

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Overview** tab.
   In the Inventory overview section, the **Open asset remediation tasks** card shows the number of open remediation tasks for asset attestations.
3. On the Open asset remediation tasks card, select the **View records** to view the list of remediation tasks that need your action.

Result
The list of asset remediation tasks with **Status** as **Open** is displayed.

What to do next
Complete the remediation task for asset attestation in the Hardware Asset Workspace.

Complete the remediation task for asset attestation in the Hardware Asset Workspace

As an asset manager or inventory administrator, complete the open remediation task that was created when your employee denied ownership of the assigned serialized hardware asset.

Before you begin
Role required: asset or inventory_admin

Procedure

1. View the list of asset attestations.

UI option	Action
Inventory view	**a.** Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**. **b.** Select the **Asset attestations** tab.
Asset operations view	**a.** Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset operations**. **b.** From the Attestation list, select the **Attestations**.

2. Select the asset attestation record for which you want to complete the open asset remediation task.
3. Select the **Remediation tasks** tab.
4. Select the remediation task that's in the Open state.
5. **Optional:** In the **Work notes** field of the Asset Task Details form, provide comments related to the asset remediation task.
6. Select **Close Task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The State of the asset changes from **In use** to **Missing**.
- The **Assigned to** field on the asset record is empty.

Reporting and performance

Monitor hardware asset performance, track total cost of ownership, manage stockroom inventory reports, and view HAM maturity items to measure and improve your Hardware Asset Management program.

Perform these tasks as needed to report on and assess the performance of your hardware assets in HAM.

Task details

Task	Description
Analyze hardware assets with generative AI	Use the AI-generated analysis summary to view asset data and identify action items.
Create a TCO report	Create and compare TCO reports for hardware assets against actual, projected, or benchmark costs.
Manage and monitor hardware asset performance	Monitor hardware asset performance metrics and time spent on asset tasks.
Manage stockrooms with inventory reports	Monitor stockroom inventory levels and identify supply gaps using inventory reports in the Hardware Asset Workspace.
View all maturity items for HAM	Review HAM maturity items to identify gaps and improvement opportunities in your Hardware Asset Management.

Analyze hardware assets using the Generate hardware asset insights generative AI skill

View consolidated asset data and identify key action items with the comprehensive AI-generated analysis summary.

Before you begin

Summaries are available only for assets within the Hardware and Asset classes and that are licensed and associated with an opted-in resource category.

Important: This feature doesn't support pallets, consumables, bundles, and assets that are opted out of HAM workflows.

Role required: asset

About this task

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

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the Australia Patch 4 release, Google Gemini is the default model provider for the Generate hardware asset insights generative AI skill.

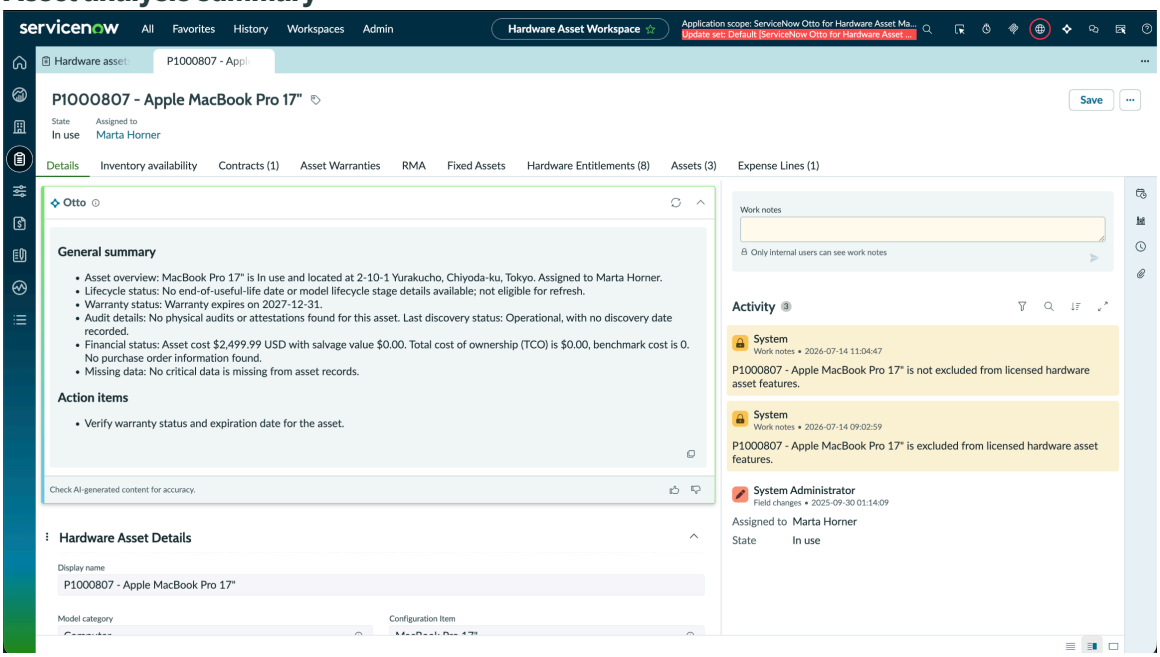
The Generate hardware asset insights generative AI skill generates comprehensive asset analysis summaries by aggregating data from related records. These summaries provide insights into the asset lifecycle, chain of custody, audit status, and financial metrics to support key asset management activities. The level of detail in the summary depends on the amount of data available for that specific asset. The summary dynamically updates based on asset state and includes context from any active incidents, change requests, or tasks. To maintain data integrity and streamline workflows, the skill highlights missing information and lists specific action items.

Note: You can view incident and change request details in the summary only if the asset role is provisioned with read access to the Incident [incident] and Change Request [change_request] tables.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **Hardware assets** tab.
3. Select the asset record that you want to analyze.
4. Select **Summarize**.
   An asset analysis summary card with a consolidated overview of critical asset data and potential actions is displayed.

Asset analysis summary



Create a TCO report in Hardware Asset Workspace

Create your own Total Cost of Ownership (TCO) report to compare the actual or projected TCO of multiple assets or compare the actual or projected asset TCO with the benchmark cost of the hardware model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: asset

Procedure
1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset analytics**.
2. In the Comparative reports section, select **New**.
3. On the form, fill in the fields.

TCO report

Field	Description
Name	Name of the TCO report.
Type	Type of the TCO report. ○ TCO comparison: Costs of multiple assets are compared. ○ TCO vs benchmark: Costs of assets are compared with the benchmark cost.
Report table	Table for Hardware Asset Management, Hardware (alm_hardware).
Total cost type	○ Actual TCO: The TCO value of the selected asset. ▪ If both Actual TCO and Real time report check boxes are selected, the generated TCO report is real-time and offline based on the Real time report selection. ▪ If only Actual TCO is selected, the generated TCO report is offline. ○ Projected TCO: This value is referenced from the following formulas and the generated report is only offline. ▪ When useful life of the asset is equal to or greater than asset life, the Projected TCO (at end of life) is calculated by using the following formula: `Normalized TCO * Useful life` , where Normalized TCO (TCO per month) is `(Purchase cost / Useful life) + (Sum of operational cost / Asset life)` . ▪ When useful life of the asset is lower than asset life, the Projected TCO (at end of life) is calculated by using the following formula:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	`Normalized TCO * Asset life`, where Normalized TCO (TCO per month) is `(Purchase cost + Sum of operational cost) / Asset life`.
Description	A brief and meaningful description of the report.
Show benchmark	Option for indicating the benchmark cost in the report. This field appears only when **Type** is selected as **TCO comparison**.
Benchmark model	Asset model to indicate the benchmark cost. When TCO comparison is selected in the Type field, this field appears only when the **Show benchmark** check box is selected.
Real time report	Option for generating real-time data on the report.
Workspace	The workspace you're working on. Default: HAM

4. Select **Save**.

Result
The TCO report is generated and displayed in the Comparative reports section of the Total Cost of Ownership dashboard.

Create a TCO report source

Create a Total Cost of Ownership (TCO) report source for TCO reports.

Before you begin
Role required: asset

Procedure
1. Navigate to **Hardware Asset Workspace** > **Asset analytics**.
2. Open the report for which you want to create report sources from the Comparative reports section.
   You can also create a comparative report. For more information, see Create a TCO report in Hardware Asset Workspace.
3. Select the **Report sources** tab.
4. Select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. On the form, fill in the fields.

Create New TCO report source

Field	Description
Name	Name of the report source.
Active	Option to indicate if the report source is active or not. By default, this check box is selected. **Note:** You can have a maximum of four active report sources for a report at any given time. If you want to add another active report source, you must inactivate another report source.
Report table	Table for Hardware Asset Management, Hardware (alm_hardware).
Set conditions	Filter to select assets with certain conditions.
Description	A brief and meaningful description of the report source.

6. Select **Save**.

Result
The new report source is added to the list of TCO report sources in the **TCO report sources** tab.

Related topics

Asset Total Cost of Ownership for Hardware Asset Management

Asset analytics view

Manage and monitor hardware asset performance

Configure settings for asset KPI tracking and monitor asset KPIs using performance reports in the Hardware Asset Workspace.

Monitor hardware asset performance with Asset KPIs report

Track the asset availability and related KPI values in the report to see how well a hardware asset is performing.

Before you begin
Role required: asset

About this task
The Asset KPIs report is available for a hardware asset under the following conditions:

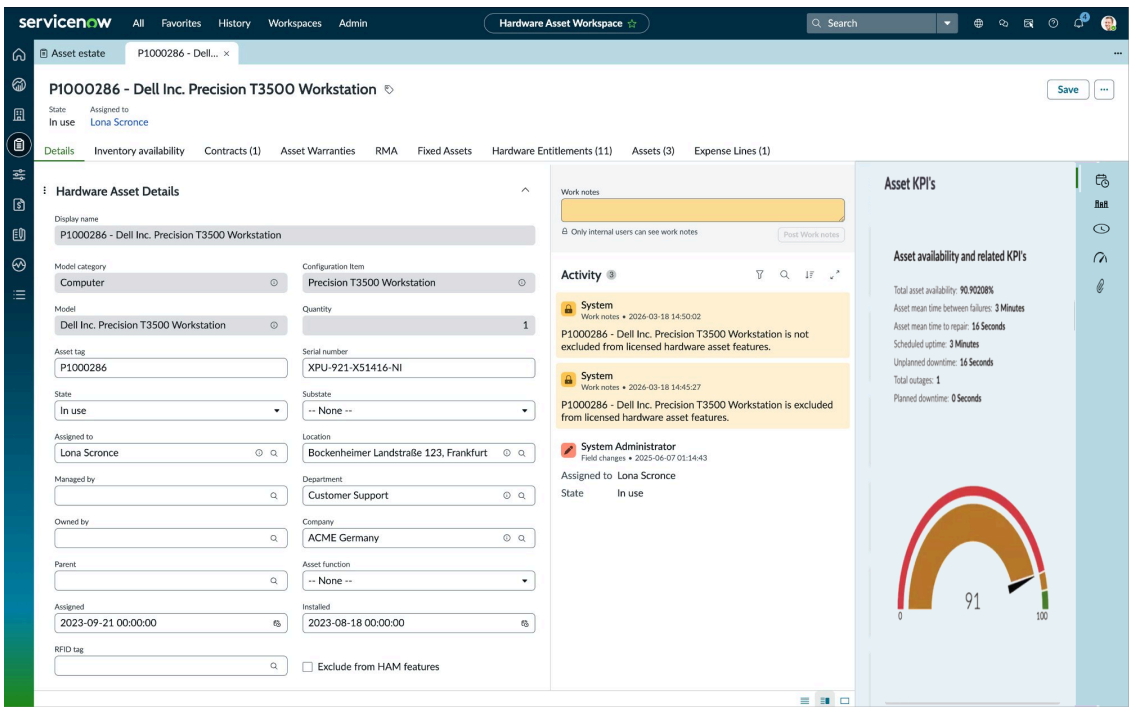
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The asset belongs to a model category of an opted in resource category, and for which the performance tracking is enabled. For details, see Opt in to model categories to track performance KPIs for hardware assets.
- The asset has moved to the In use state, and its KPIs have been calculated and are available in the Asset Availability table [sn_ent_asset_availability].

Note: The *Calculate asset performance KPIs* scheduled weekly job runs every Saturday to calculate the KPIs for the assets. These KPIs are then reflected in the Asset availability and related KPIs report, which displays the most recent KPI values.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset estate**.
2. Select the **All assets** tab.
3. Select the asset record for which you want to view the details of the asset key performance indicators (KPIs).
4. On the contextual sidebar, select the Asset availability and related KPIs icon .
   The Asset KPIs report is displayed.



5. To view the details of the report, select any section on the report.
   A form view of the availability record for the asset is shown with additional details such as the following:
   - **Current asset schedule**: The asset schedule linked to the asset currently and used for KPI calculations. If no schedule is linked, the Default asset schedule is used.
   - **Start**: The date and time when the asset KPI values were first calculated.
   - **End**: The date and time when the asset KPI values were last calculated.
   - **Outages During Interval** tab: A list of outages with details like start and end time of the outage and the duration of the outage. For more details on outage record creation and handling, see Asset performance reports in the Hardware Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View the total time worked on all tasks related to a hardware asset

Use the Asset task time summary report to see the details of the time spent on all tasks for an asset and its child assets, grouped by task category.

Before you begin

Role required: asset

About this task

Asset task time refers to the total time spent on all tasks related to an asset. The total time spent includes the sum of time worked on all related tasks for the asset and its child assets.

Note:

Time spent on tasks related to child assets is rolled up to the parent asset only if the tasks were created and closed after the **last_used** date on the child assets. The total time from these tasks is then aggregated and added to the parent asset's time spent.

When a child asset is removed from a parent asset, the total time spent on the parent asset remains the same. Therefore, the time spent lines associated with the parent asset will be available even after the child asset is removed.

The time worked on a task is tracked after you start working on it and select **Start Timer** until you close the task. The timer automatically stops when you close the task, and the total duration is updated. You can also pause the timer when you aren't working on the task by selecting **Pause**, and then select **Resume** when you continue to work on the task. You can also add time worked details to the task manually by selecting **Record Time**. The time worked on a task is stored in the Time worked [task_time_worked] table.

After a task is closed on a parent or child asset, a time spent line is generated and stored in the Time spent line table [sn_itam_common_time_spent_line]. Each time spent line includes the time worked on the asset task. The sum of the time spent values in these time spent lines gives the total asset task time. If a task involves multiple assets, the total time spent is equally divided among them. This equally distributed time is then aggregated to the parent asset if there are any child assets involved.

Note: When you upgrade to Hardware Asset Management version 13.0.0, the *`Calculate asset time spent`* fix script creates time spent lines for asset tasks that have already been completed and closed.

The total time spent is grouped by the following task categories:

- **Purchase - Asset**: Includes the following tasks
  - All tasks in the Refresh flow except the Reclaim aged asset task.
  - All tasks in the Zero touch refresh flow
  - Replacement task in the Return Merchandise Authorization (RMA) flow
  - Replacement task in the Recall flow
- **Labor - Maintenance**
- **Labor - Repair**: Includes tasks in the following workflows:
  - Repair order
  - RMA order
  - Incident
- **Labor - General**: Includes tasks in the following workflows:

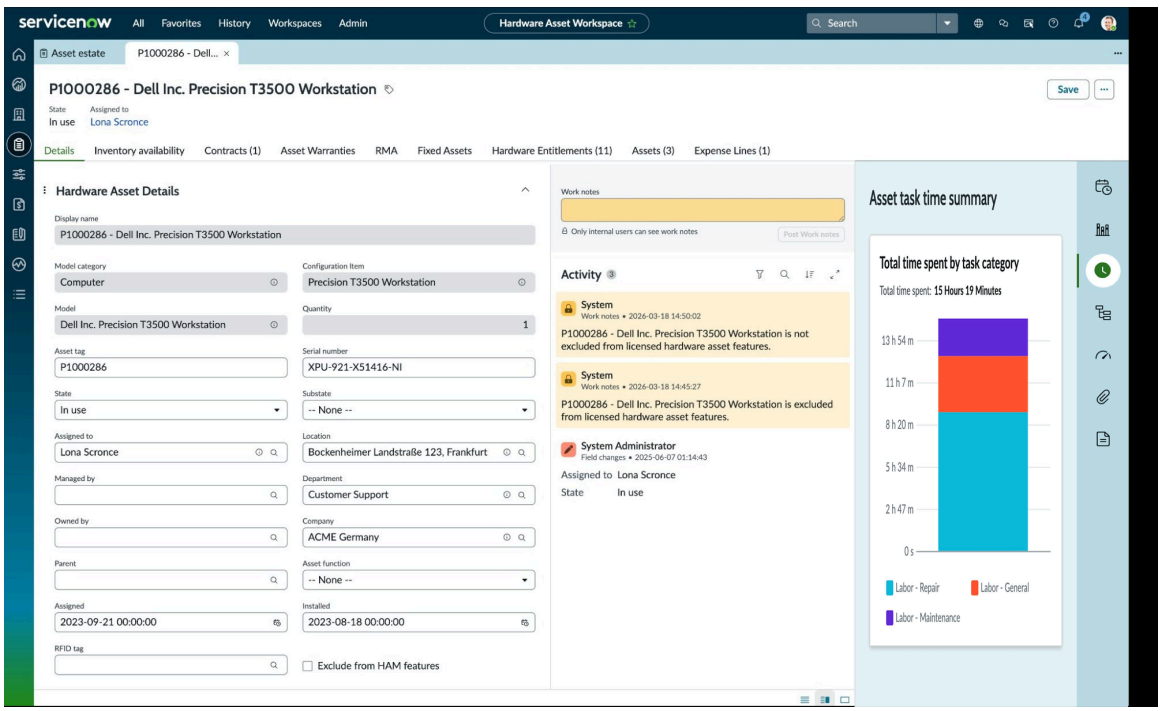
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Asset reclamation
- Asset donation
- Resale
- Disposal
- Lease return
- Transfer order
- Loaner
- Asset onboarding
- Asset refresh flow (only the Reclaim aged asset task)
- Asset request (Pick task)
- Drop off and Receive task
- Change

Note: Total time spent on an asset task isn't calculated for pallets, consumables, and bundle assets. Therefore, the Asset task time summary report isn't available for these assets.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset estate**.
2. Select the **All assets** tab.
3. Select the asset record for which you want to view the details of the total time spent on the tasks.
4. On the contextual sidebar, select the Asset task time summary icon .
   Total time spent by task category report is displayed.



The Asset task time summary report includes the following details:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Total time spent**: Total time worked on all related tasks for the asset, including tasks on child assets.
- Breakdown of total time spent: Total time worked on all related tasks, divided and shown separately for each task category. This visualization helps you to see how much time was spent on tasks within each task category.
- Legends for the task categories: Legends shown are based on the actual asset tasks and their task categories. The legends include the following:
  - **Purchase - Asset**
  - **Labor - Maintenance**
  - **Labor - Repair**
  - **Labor - General**

5. To view the details of the time spent on all tasks within a specific task category, select the corresponding task category section in the report.
   The list of time spent lines is displayed, with each line showing the following details:
   - **Source asset**: Display name of the asset, including both parent and child assets, for which time was spent on the task.
   - **Task**: Task number
   - **Task type**: Type of the task, such as the Hardware RMA Order Line task.
   - **Task name**: Name of the task, such as Prepare or On-site repair.
   - **Time spent**: Time worked on the asset task.
   - **Short description**: A brief description of the task.
   - **Closed**: The date and time when the asset task was closed.
   - **Task category**: Category to which the task belongs.

Manage stockrooms with inventory reports in the Hardware Asset Workspace

Track and manage stockrooms efficiently by evaluating the inventory reports in the Hardware Asset Workspace.

The inventory reports help you:

- Find replacement options for assets.
- Quickly identify shortages and align current demand in your stockroom with both current and incoming supply.
- Analyze the supply to meet open demand across all stockrooms or locations.

Identify suitable replacement options for assets in the Hardware Asset Workspace

Use the Inventory availability report to determine suitable replacement options for your assets and their child components that are in use, in maintenance, pending repair, or defective. The report also helps you to determine the quantity of available substitute models that can be used locally, moved through the distribution channels, and estimate the lead time for new purchases.

Before you begin

The Inventory Availability Report is available only for hardware, consumable, and bundle assets that are in use, in maintenance, pending repair, or defective.

Service locations and distribution channels should be configured for the stockroom. If the asset's location is a service location of a stockroom, it automatically becomes the local stockroom. A location can have multiple local stockrooms if it is serviced by more than one stockroom. For

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

more details, see Associate a stockroom with service locations and Link stockrooms into a distribution channel.

Role required: asset

About this task

The Inventory availability report helps you to identify the best sourcing option when sourcing assets or its components that are in use and nearing the end of their life, defective, or pending repair. Additionally, you can check how much stock is currently available at a stockroom.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Asset estate**.
2. Select the asset for which you want to view the replacement assets available in the local and remote stockrooms.
3. Select the **Inventory availability** tab.

   The list displays the asset and any of its child assets, along with their linked models and any substitute models. The list includes the following details:

Inventory availability report

Field	Description
Asset	Display name of the asset.
Model	Model of the asset. **Note:** If there are any substitute models for the asset model, they're also displayed.
Asset type	Indicates whether the asset is the original asset or a substitute model asset. This field can have any of the following values: ○ **Original parent** for the actual parent asset. ○ **Original child** for the child of the original parent asset. ○ **Substitute parent** for the asset of the substitute model. ○ **Substitute child** for the child asset of the substitute model.
Local stockroom quantity	Quantity of assets that are in stock and available in the stockrooms that service the asset location. **Note:** If you select the quantity shown, you can view the full list of assets in your local stockroom that can be used as replacements. There can be multiple local stockrooms if more than one stockroom serves the same location.
Remote stockroom quantity	Quantity of assets that are in stock and available in the distribution channel stockrooms that are marked as inbound stockrooms to the current local stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If you select the quantity shown, you can view the full list of assets in your distribution channel stockrooms that can be used as replacements.
Purchase lead time	Average time in days it has taken from ordering to receiving replacement assets through new purchase orders.

Identify the supply and demand for models within a stockroom in the Hardware Asset Workspace

Use the Supply vs Demand report to evaluate the available and incoming quantity of models in your stockroom and the requests for these models from different service locations. This report helps you determine if you have enough assets to meet the demand.

Before you begin

Supply refers to the assets that are currently in stock and those that are incoming at your stockroom. Demand refers to the requests for assets from different service locations that your stockroom services.

Note the following points about the Supply vs Demand report:

- Supply of an asset model to your stockroom includes:
  - In stock assets that are in the Available, Reserved, Pending transfer, and Pending install stage
  - Incoming transfer orders that are partially shipped, fully shipped, in transit, received, and delivered
  - Incoming purchase orders that are ordered
- Demand for an asset model includes:
  - Outgoing transfer orders that are in the Draft, Requested, and Shipment preparation stage
  - Asset requests
  - Refresh requests
  - Work order parts requests

The supply and demand details are stored in the Model and stockrooms [sn_asset_model_and_stockroom] table. The *`Populate model and stockroom data`* scheduled job runs daily to populate this table.

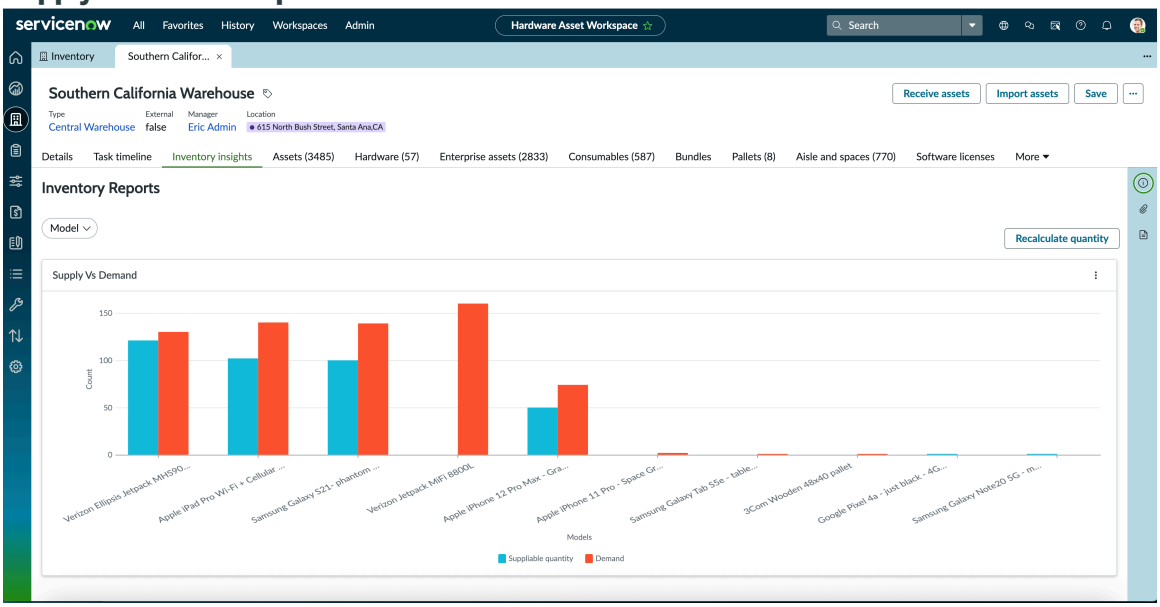
Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of stockrooms, select the one for which you want to view the supply and demand details.
4. Select the **Inventory insights** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Supply vs Demand report



The Supply vs Demand report shows the count on the y-axis and the model on the x-axis, with separate bars for supply and demand for each model. This visual representation helps you to compare the available quantity of each model in the stockroom with the number of requests from different service locations. By looking at the graph, you can determine which models have enough supply to meet demand and which ones need more stock.

Note: By default, the graph shows details for only 10 models.

5. View the details of the model that isn't shown on the report.
   a. Select the **Model** filter.
   b. Enter the model in the search field or select the model from the **Available** list.
   c. Move the selected model to the **Applied** list.
   d. Select **Apply**.
6. To further drill down into the supply or demand for a model and view its component-level details, select the corresponding bar.
   - The supply graph shows the count of the following:
     - **In stock assets**
     - **Incoming transfer order**
     - **Incoming purchase order**
   - The demand graph shows the count of the following:
     - **Outgoing transfer order**
     - **Asset requests**
     - **Refresh requests**
     - **Work order parts requests**

   By selecting the relevant bars, you can view the list of assets that make up the count.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. **Optional:** To initiate the calculation of supply and demand for asset models manually, select **Recalculate quantity**.

   (Optional) The Supply vs Demand graph updates to show the recently calculated values.

Identify the supply for open demands in the Hardware Asset Workspace

Use the Open demands report to determine available stock within local stockrooms and distribution channels to fulfill sourcing requests that are open.

Before you begin
Role required: asset

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Procurement**.
2. In the Procurement overview, select **Open demands**.

   The report displays the list of open demands with the following details:

   - Requests and requested items.
   - The quantity of the requested model available in local stockrooms that serve the asset location.
   - The quantity of the requested model available in distribution channel stockrooms that serve the asset location.
   - The purchase lead time, which is the average time in days it has taken from ordering to receiving assets through new purchase orders.
3. To view the current stock availability in the local stockrooms for all open requests for a model and determine if there is sufficient quantity, select the number shown in the **Local stockroom quantity** column.
   The available asset quantity is determined by the current state. If two requests from a service location, which is serviced by two or more stockrooms, are for the same model and the available quantity is 100, the report will show 100 available in the local stockroom for both requests. Once one request is fulfilled, the quantity will update to reflect the remaining amount for the other request.
4. To view the current stock availability in the distribution channel stockrooms for all open requests for a model and determine if there is sufficient quantity, select the number shown in the **Remote stockroom quantity** column.

View all maturity items for Hardware Asset Management

View the maturity of your Hardware Asset Management (HAM) program to analyze the status of each maturity stage, where each stage shows the number of maturity items completed.

Before you begin
Role required: asset

Note: The asset role can also change the state and success goal of the maturity item.

About this task
The maturity of your HAM program is divided into three stages:

- Crawl
- Walk
- Run

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information, see Maturity stages of your Hardware Asset Management program.

Note: The maturity level can't be modified for a required maturity item.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Success portal**.
2. On the Overview page, select **View all maturity items**.
   The All maturity items page opens, which lists all the maturity items included in the stage your HAM program is in.
3. Select a maturity item to view its details.
   For a description of the field values, see Maturity item details.
4. Select **Save**.

Employee self-service

Request hardware assets, acknowledge deliveries, confirm asset assignments, and report asset issues directly from the Employee Center or Now Mobile.

Perform these tasks as needed to manage your hardware assets through self-service.

Task details

Task	Description
Request and receive assets using the Zero Touch request flow	Request hardware assets through the Service Catalog and confirm receipt of assets.
Request and receive assets using the Zero Touch Refresh flow	Request a hardware asset refresh and confirm receipt of the replacement asset from an external provider.
Request a loaner asset	Request a temporary asset for use.
Acknowledge receipt of assets on the Employee Center portal	Confirm receipt of hardware or consumable assets reserved and shipped to your location.
Confirming the assigned serialized hardware assets	Confirm your assigned serialized hardware through the Now Mobile app or the Employee Center portal.
Raise issue related to your asset	Use the Employee Center portal to report and resolve asset issues.

Request and receive assets using the Zero Touch request flow

Request standard hardware assets through the Service Catalog and acknowledge receipt of assets fulfilled by an external provider.

Request a hardware asset through the Zero Touch request flow

Request a hardware asset directly with the external provider through the Zero Touch request flow by ordering the asset from the Service Catalog.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Service Catalog** > **Hardware**.
2. On the catalog request, provide the required details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The fields displayed on the catalog request form vary with the catalog item and the provider. The provider requires these field values to fulfill the request.

3. In the **Quantity** field of the Order this item section, select the quantity of items that you want to order.

   Note: If your provider supports multiple assets in a single request, an additional field to enter the quantity details is displayed on the catalog request only when your Catalog Administrator hasn't hidden the equivalent quantity variable for the catalog item. However, the quantity that you selected in the **Order this item** section is considered for your request.

4. Select **Submit**.

Result
Your hardware catalog request is successfully submitted.

Acknowledge receipt of an asset received through the Zero Touch request flow

As an employee, acknowledge receipt of the new asset that you received through the Zero Touch request flow on a mobile device.

Before you begin
To use your mobile device for this acknowledgment, you must have the ServiceNow mobile app installed on your iOS or Android mobile device.

Role required: User of the asset.

About this task
You can only confirm the receipt of hardware assets on a mobile device. To acknowledge the receipt of consumable assets, contact your Asset Manager.

Procedure
1. Navigate to **My Items** > **My assets**.
2. Tap the asset.
3. Tap **Scan delivered asset**.
4. Provide the asset tag information.
   - To provide the information through a scan, scan the asset tag of the asset.
   - To provide the information manually, enter a value in the **Asset tag** field.
5. Select **Submit**.

Result
- The state of the asset changes to **In use**.
- The stage of the requested item in the catalog request changes to **Complete**.

Request and receive assets using the Zero Touch Refresh flow

Request a hardware asset refresh and acknowledge receipt of the replacement asset fulfilled by an external provider.

Request a hardware asset refresh through Zero Touch Refresh

As an employee, request to replace a hardware asset that you own with a new asset directly with the provider through Zero Touch Refresh.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: none

Procedure

1. Navigate to **All** > **Service Catalog** > **Asset Lifecycle**.
   If the Asset Lifecycle category isn't available in the service catalog, contact your administrator.
2. On the Asset Lifecycle page, select **Zero Touch Refresh**.
3. On the form, fill in the fields.

Zero Touch Refresh form

Field	Description
Asset	Hardware asset that you own that you want to refresh. If you select an asset that is not eligible for refresh, a message stating that approvals will be requested is displayed. An approval request is then automatically sent to the asset manager.
Replacement model	Asset model with which you want to replace the hardware asset. The list shows the refresh models based on the model of the hardware asset that you selected and the location of the asset. If the location of the asset isn't specified in the asset record, the location of the requester is considered.

4. Determine where the replacement asset should be sent.

Shipping location	Action
Your location	In the **Refresh method** field, select **Ship**. **Note:** The form shows your contact de tails such as your address and phone number. You can change your contact details if necessary.
Stockroom	**a.** In the **Refresh method** field, select **Pickup**. **b.** In the **Pickup location** field, select the loca tion of the stockroom from which to collect your new asset. **Note:** The Locations list shows all the stockroom locations in your coun try.

5. Confirm the shipping address choice by selecting the acknowledge check box at the bottom of the Zero Touch Refresh form.
6. Select **Submit**.
7. **Optional:** View the status of your Zero Touch Refresh request by navigating to **All** > **Self-Service** > **My Requests**.

Result
Your Zero Touch Refresh request is successfully submitted.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Acknowledge receipt of an asset on a mobile device

As an employee, acknowledge receipt of the new asset that you received through a Zero Touch Refresh request on a mobile device.

Before you begin

To use your mobile device for this acknowledgment, you must have the ServiceNow mobile app installed on your iOS or Android mobile device.

Role required: none

Procedure

1. Navigate to **My Items** > **My assets**.
2. Tap the asset.
3. Tap **Scan delivered asset**.
4. Provide the asset tag information.
   - To provide the information through a scan, scan the asset tag of the asset.
   - To provide the information manually, enter a value in the **Asset tag** field.
5. Select **Submit**.

Result

- The state of the asset changes to **In use**.
- The state of the Receive asset task of the Zero Touch Refresh request changes to **Closed**.

Acknowledge receipt of an asset through the Core UI

As an employee, acknowledge receipt of the new asset that you received through a Zero Touch Refresh request through the Core UI on your ServiceNow instance.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Self-Service** > **My Requests**.
2. Select the Zero Touch Refresh request.
3. In the **Zero Touch Refresh Tasks** tab, select the **Receive asset** task.
4. Select **Close task**.

Result

The state of the Receive asset task of the Zero Touch Refresh request changes to **Closed**.

Request a loaner asset

Request a temporary or loaner asset or consumable and use it for a short period.

Before you begin

Role required: None

While requesting a loaner asset, confirm that the start date is within three months from the date of submission, and the end date is within six months from the start date.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Request a loaner asset for a specific period. You can request it for yourself, for another employee of your organization, or for a third-party vendor. Before the asset is installed, you can cancel the loaner asset request at any time.
You can submit a loaner order even if the product isn't available at the moment in the location you want to select. In this case, your order is placed in the queue.

Procedure

1. Navigate to **All** > **Service Catalog** > **Asset Lifecycle**.
   The **Asset Lifecycle** category isn't on the Service Catalog page by default. To add this category, log in with admin credentials, select the add content icon next to the search catalog bar and then select **Asset Lifecycle**.
2. Select **Loaner Asset Request**.
3. On the form, fill in the fields.

Loaner Asset Request form

Field	Description
Requested for	Person for whom you're requesting the asset. You can make a request for yourself, for another employee of your organization, or for a third party vendor.
Requested for user	User for whom you requested the asset. This field appears only when **For company user** is selected in the **Requested for** field.
Location	Location where the requested asset should be provided. When the location that you specified is a service location of multiple stockrooms, the Model field shows the list of loaner asset models that are available in all those stockrooms in addition to the models available in the stockroom of that location. For more details on service locations, see Associate a stockroom with service locations.
Model	Model of the asset that you're requesting.
Start date	Date when you want to start using the asset.
Return date	Date when you want to return the asset.
Justification	Reason why you need the asset.

   After entering the **Start date** and **Return date**, if there are no loaner assets available in the selected location and for the selected time period, a warning appears. If you still submit the loaner order, your loaner order will be in a waitlist.
4. Select **Submit**.
   A message appears and shows whether your loaner order was placed successfully or the order was placed in a waitlist.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

To view your request, navigate to **Self-Service** > **My Requests**. You can also view your order by using the Now Mobile app.

Before you receive your loaner asset, you can cancel the loaner asset request by selecting **Cancel**. After you receive your loaner asset, the **Cancel** button doesn't appear anymore. You can also return your loaner asset before the specified **Return date**.

Acknowledge receipt of assets on the Employee Center portal

After receiving hardware or consumable assets that were in transit and reserved for you, confirm their receipt on the Employee Center portal.

Before you begin

Role required: Log in as an employee.

To view the **My Assets** option on the global header navigation bar of the Employee Center portal, the value of the **enable_assets** option must be set to **true** on the Additional options, JSON format field of the Employee Center menu record. For more details, see Enable or disable global header options.

Note: The **My Assets** option requires the Hardware Asset Management application to be activated.

About this task

When an asset reserved for you is in transit, you will receive an email notification with a link to the Employee Center Portal, where you can acknowledge its receipt. You can receive an asset even if the asset is excluded from Hardware Asset Management workflows or if the associated resource category isn't opted in.

Procedure

1. View the assets that are reserved for you on the Employee Center portal.
   - Select the **Receive assets** link in the email notification that you received.

     The link opens the **My Assets** page on the Employee Center portal.
   - View assets using any of the options available in the global header navigation bar of the Employee Center portal.

UI options on the global header navigation bar

UI option	Action
My Assets	Select **My Assets** in the global header navigation bar of the Employee Center portal. **Note:** The number displayed on the **My Assets** option represents the total count of assets that must be attested and received.
Profile	**a.** Select **Profile** on the global header navigation bar of the Employee Center portal. **b.** Select the **Assets** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The page displays all the hardware and consumable assets that are assigned to you, in transit, and reserved for you. You can acknowledge the receipt of hardware and consumable assets that are in transit.

2. Acknowledge after you receive the asset.

Asset	Action
Hardware	**a.** For the hardware asset that you want to re ceive, select **Receive asset**. **b.** In the Receive asset dialog box, follow any of these steps: ▪ If the **Asset tag** and **Serial number** fields have values, verify them and then select **Submit**. ▪ If either the **Asset tag** or **Serial number** field is empty, enter the value and then select **Submit**. **Note:** You can only enter values in the empty **Asset tag** or **Serial number** fields if the value of the *sn_hamp.enable_asset_tag_serial_numbe* system property is set to **true**. This system property can be updated with the admin role. **Result:** ○ Asset is received successfully. ○ Status of the asset changes from **In transit** to **In use**, and the asset is assigned to you. ○ The **Receive asset** option is no longer available for that as set. ○ Any receive task associated with that asset is automatically closed. **Note:** If the details of the asset that you received don't match the informa tion shown in the Receive Asset dialog box, you can raise an issue by selecting the **Raise issue** option. For more details, see Raise issue related to your asset on the Employee Center portal.
Consumables	**a.** For the consumable asset that you want to receive, select **Receive asset**. **b.** In the Receive asset dialog box, enter the quantity of consumables that you received in the **Quantity** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset	Action
	Note: By default, this field displays the consumable quantity that you re quested. You can enter a value that is lesser than or equal to the requested quantity, but it must be a positive num ber and not zero. **c.** Select **Submit**. **Result:** ○ If you received the full request ed quantity of consumables, then the Status of the asset changes from **In transit** to **Con sumed**, and the asset is as signed to you. ○ If you received only a partial quantity of the requested consumables, the following changes occur: ▪ The status of the assets that you received changes from **In transit** to **Consumed**, and the assets are assigned to you. ▪ The status of the assets that you didn't receive remains **In transit**. **Note:** Consumed and in transit consumables are displayed separately.

Confirming the assigned serialized hardware assets

As an employee, acknowledge whether you have the serialized hardware that's assigned to you either through the Now Mobile app or on the Employee Center portal.

Confirm the assigned assets using the Now Mobile app

As an employee, acknowledge or deny the ownership of the serialized hardware assets assigned to you using the Now Mobile app.

Before you begin

Role required: Log in as an employee.

Procedure

1. From your mobile device, launch the Now Mobile app.
2. On the home screen of the Now Mobile app, tap **My assets** from the My items list.
   The list of all assets assigned to you, as well as those assets that need your confirmation, is displayed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The **Confirm asset** indicator on any asset in the list indicates that you should acknowledge whether you have that asset or not.

3. Tap the asset with the **Confirm asset** indicator.
   The following asset details are displayed:
   - **Asset tag**
   - **Serial number**
   - **Display name**
4. Verify the asset details and tap **Confirm asset**.
5. Acknowledge or deny the ownership of the asset by selecting your response in the **Verify asset** dialog box.
   - To confirm that you have the asset, tap **Yes**.
   - To confirm that you don't have the asset, tap **No**.

     To further confirm whether you have the asset or not, select your response to the question **Are you sure you don't have this asset?**.

     a. To proceed with your confirmation, tap **Confirm**.

     b. To cancel your confirmation, tap **Cancel**.

Result

- The **Confirm asset** indicator is no longer displayed for the asset.
- The **Attestation date** field of the asset on the asset attestation form is updated with the actual date on which you confirmed the asset.
- The **State** field of the asset attestation changes from In progress to Closed complete only when that attestation has no other users and assets involved.
- The **Status** field of the asset on the asset attestation form is updated based on your confirmation:
  - If you selected **Yes**, the **Status** field changes from **Open** to **Yes**.
  - If you selected **No**, the **Status** field changes from **Open** to **No**. Also, a remediation task is created for that attestation. The administrator can work on that task and initiate an investigation to find the asset status.

Confirm the assigned assets on the Employee Center portal

As an employee, acknowledge or deny the ownership of the serialized hardware assets assigned to you on the Employee Center portal.

Before you begin

Role required: Log in as an employee.

To view the **My Assets** option on the global header navigation bar of the Employee Center portal, the value of the **enable_assets** option must be set to **true** on the Additional options, JSON format field of the Employee Center menu record. For more details, see Enable or disable global header options.

Note: The **My Assets** option requires the Hardware Asset Management application to be activated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. View the assets that are assigned to you on the Employee Center portal.
   - Select the **Confirm assets** link in the email notification that you received.

     The link opens the **My Assets** page on the Employee Center portal.
   - Select **My Assets** in the global header navigation bar of the Employee Center portal.

     Note: The number displayed on the **My Assets** option indicates the number of assets that you must confirm.
   - View the list of assets from the Employee Profile.

     a. Select **Profile** on the global header navigation bar of the Employee Center portal.

     b. Select the **Assets** tab.

   The page displays all the hardware and consumable assets assigned to you. However, you can only confirm serialized hardware assets that are opted-in.
2. For the hardware asset that you want to confirm, select **Confirm asset**.
   You can view the following details of the asset:
   - Display name
   - Asset tag
   - Serial number
   - Asset function

   Note: Any field that's empty isn't shown on the Confirm asset page.
3. Acknowledge or deny the ownership of the asset by selecting your response to the question **Do you have this asset?**.
   - To confirm that you have the asset, select **Yes**.
   - To confirm that you don't have the asset, select **No**.
4. Select **Submit**.

Result

- The **Confirm asset** option is no longer displayed for the asset.
- The **Attestation date** field of the asset on the asset attestation form is updated with the actual date on which you confirmed the asset.
- The **State** field of the asset attestation changes from In progress to Closed complete only when that attestation has no other users and assets involved.
- The **Status** field of the asset on the asset attestation form is updated based on your confirmation:
  - If you selected **Yes**, the **Status** field changes from **Open** to **Yes**.
  - If you selected **No**, the **Status** field changes from **Open** to **No**. Also, a remediation task is created for that attestation. The administrator can work on that task and initiate an investigation to find the asset status.

Related topics

Employee Center

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Raise issue related to your asset on the Employee Center portal

Get the issue related to your assets resolved by reporting the issue on the Employee Center portal.

Before you begin

Role required: Log in as an employee.

To view the **My Assets** option on the global header navigation bar of the Employee Center portal, the value of the **enable_assets** option must be set to **true** on the Additional options, JSON format field of the Employee Center menu record. For more details, see Enable or disable global header options.

Note: The **My Assets** option requires the Hardware Asset Management application to be activated.

Procedure

1. View the assets that are assigned to you on the Employee Center portal.
   - Select **My Assets** in the global header navigation bar of the Employee Center portal.
   - View the list of assets from the Employee Profile.
     a. Select **Profile** on the global header navigation bar of the Employee Center portal.
     b. Select the **Assets** tab.

   The page displays all the hardware and consumable assets that are assigned to you.
2. For the asset for which you want to report an issue, select **Raise issue**.
3. On the form, fill in the fields.

Raise Issue form

Field	Description
Location	Location details of the asset.
Who is affected?	Name of the user who is impacted by the issue with the asset. By default, this field is automatically populated with the name of the logged-in user. However, you can raise the issue on behalf of any other user.
Urgency	Priority to be given to the issue. By default, this field is set to **3- Low**. The other available values are: ○ **1 - High** ○ **2 - Medium**
Short description	Brief information about the issue related to the asset. This field is required.
Preferred methods of contact	Mode of communication preferred. The available methods of contact are: ○ Email ○ Phone ○ Self-service ○ Walk-in ○ Chat ○ Virtual Agent

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. **Optional:** Select the Add attachments icon to attach any document related to the issue.
5. Select **Submit**.

Result
Your request is submitted successfully.

What to do next
You can view and track the submitted requests by selecting **My Requests** on the global header navigation bar of the Employee Center portal.

Manage hardware asset tasks using the Mobile Agent application

Manage hardware asset tasks such as repair tasks and asset pick tasks using the intuitive Mobile Agent application.

Manage hardware asset repair tasks using the Mobile Agent application

Manage all the repair tasks associated with the defective hardware assets in your stockroom using the intuitive Mobile Agent application.

View your hardware asset repair tasks using the Mobile Agent application

View the Troubleshoot asset, Repair asset, and Evaluate asset tasks assigned to you by using the Mobile Agent application.

Before you begin
Role required: admin or asset

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. View all the tasks assigned to you by selecting **See all**.
4. **Optional:** Filter your tasks by field values.
   a. Tap the Filter icon .
   b. Enter values in the fields by which you want to filter your task: **Due Date**, **Asset**, **Location**, or **Priority**.
5. **Optional:** Sort your tasks.
   a. Tap the Filter icon ( ).
   b. Tap **Sort by**.
   c. Select the fields by which to sort your tasks.

Start working on a hardware asset repair task using the Mobile Agent application

Indicate in the Mobile Agent application when you start work on a repair task assigned to you.

Before you begin
Role required: asset

About this task
You can work on the repair tasks that belong to the following task types:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Asset troubleshoot task
- Asset repair task
- Asset evaluate task

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon  and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon  , tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the repair task that you want to start.
6. On the **Details** tab, tap **Start work**.

Result

On the **Details** tab, the **Start work** link changes to **Start timer**, **Record time**, and **Close** automatically.

What to do next

Record time worked on a hardware asset repair task using the Mobile Agent application.

Record time worked on a hardware asset repair task using the Mobile Agent application

Manage and record time worked on Troubleshoot asset, Repair asset, and Evaluate asset tasks using the Mobile Agent application. After you start working on a task, you can pause and resume work. You can also record the time worked manually.

Pause a hardware asset repair task using the Mobile Agent application

Record a break from a repair task for the hardware assets using the Mobile Agent application if you're not continuing to work on it.

Before you begin

After you start work on the repair task, start recording the time by tapping the **Start Timer** in the **Details** tab.

Role required: asset

About this task

You can resume the task when you start working on it again. The system automatically tracks and calculates the actual time taken to complete the task even though the work was interrupted.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. If the task you want to pause isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon (), tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the task record that you want to pause.
6. On the **Details** tab, tap **Pause**.
   On the **Details** tab, the **Pause** option changes to **Resume**.
7. Tap **Resume** when you're ready to work on the activity again.

Result

Each time you pause or resume work on the repair task, the actual time you worked on the task is automatically calculated. An entry for the time worked is created in the Time worked section of the Related tab.

Record time worked on a hardware asset repair task manually using the Mobile Agent application

Record time worked on a hardware asset repair task manually and provide any additional comments on the task using the Mobile Agent application.

Before you begin

Make sure you have indicated that you started working on the repair task by tapping **Start work** in the **Details** tab.

Role required: asset

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task for which you want to record time isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon () and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon , tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the repair task record for which you want to record time.
6. On the **Details** tab, tap **Record time**.
7. On the Record time screen, specify the details of the task.
   a. Enter the time duration that you worked on the task in the **Time worked (Hours)** and **Time worked (Minutes)** fields.
   b. **Optional:** Provide any additional information in the **Time worked comments** field.
8. Tap **Done** and then tap **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The Record time form is saved and the time card is added to the Time worked section of the Related tab.

Close a hardware asset repair task using the Mobile Agent application

Complete an assigned hardware asset repair task and mark the task as closed using the Mobile Agent application.

Before you begin
Role required: asset

About this task
You can close any task that belongs to the following task types:

- Troubleshoot asset task
- Repair asset task
- Evaluate asset task

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to close isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon () and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon (), tap **Sort by**, and select the fields to sort your tasks.
5. Tap the repair task that you want to close.
6. On the **Details** tab of the repair task, tap **Close** .
7. On the Repair task input form screen, enter the result of your task.

Task	Action
Troubleshoot asset	In the **Troubleshoot result** field, select any of the following: ○ **Repairable** ○ **Unrepairable** ○ **Redeployable**
Repair asset	In the **Repair result** field, select any of the fol lowing: ○ **Repaired** ○ **Unrepairable** ○ **Redeployable**
Evaluate asset	In the **Evaluation result** field, select any of the following:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Task	Action
	○ **Redeployable** ○ **To be disposed**

8. In the **Work notes** field, enter your closure comments.
9. Tap **Done** and then tap **Submit**.

Result
The state of the repair task changes to Closed Complete.

Manage hardware asset pick tasks using the Mobile Agent application

Work on the hardware asset pick tasks assigned to you by using the Mobile Agent application.

Start working on a hardware asset pick task using the Mobile Agent application

Indicate in the Mobile Agent application when you start work on an asset pick task assigned to you.

Before you begin
Role required: inventory_user

Procedure
1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the Asset pick task that you want to start.
   Use the details provided in the following fields on the **Details** tab to start work on the assigned asset pick task:
   - **Asset**: Asset that you should pick.
   - **Stockroom**: Stockroom from which you should pick the asset.
   - **Pick location**: Aisle and space within the stockroom from where you should pick the asset.
6. On the **Details** tab, tap **Start work**.

Result
On the **Details** tab, the **Start work** link changes to **Start timer**, **Locate**, and **Scan asset** automatically.

What to do next
Complete the Asset pick task assigned to you. For details, see Locate and pick the hardware assets in your stockroom using the Mobile Agent application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Record time worked on a hardware asset pick task using the Mobile Agent application

Manage and record time worked on hardware asset pick tasks using the Mobile Agent application. After you start working on a task, you can pause and resume work.

Pause a hardware asset pick task using the Mobile Agent application

Record a break from a hardware asset pick task by using the Mobile Agent application if you're not continuing to work on it.

Before you begin

After you start work on the hardware asset pick task, make sure to start recording the time by tapping **Start timer** in the **Details** tab.

Role required: inventory_user

About this task

After you pause a task, you can resume when you start working on it again. The system automatically tracks and calculates the actual time taken to complete the task even though the work was interrupted.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to pause isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the asset pick task record that you want to pause.
6. On the **Details** tab, tap **Pause**.

   Note: The **Pause** option is displayed only after you tap **Start timer**.

   On the **Details** tab, the **Pause** option changes to **Resume**.
7. Tap **Resume** when you're ready to work on the activity again.

Result

Each time you pause or resume work on the asset pick task, the actual time you worked on the task is automatically calculated. An entry for the time worked is created in the Time worked section of the Related tab.

Locate and pick the hardware assets in your stockroom using the Mobile Agent application

Locate a hardware asset placed in a specific aisle and space in the stockroom by using indoor maps. After locating the asset, pick and drop off the asset to another location within the stockroom using the Mobile Agent application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

You should explicitly install Indoor Mapping for Assets (com.sn_ima) application from the ServiceNow Store. When you install this application, Indoor Mapping (sn_map_core) and Indoor Mapping component (sn_map_component) are also installed.

Role required: inventory_user

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon  and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon  , tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the Asset pick task for which you have started work.
6. To locate the hardware asset in the stockroom, on the **Details** tab, tap **Locate**.
   - The exact location of the hardware asset in the stockroom is displayed on the map.
   - The **Get directions** option is displayed.
7. Get directions to the asset location in the stockroom.
   a. Tap **Get directions**.
   b. Choose the start location on the map.
   c. Tap **Save**.
   - The following details are displayed on the map:
     - Path from the start location to the asset location
     - Approximate time required for you to reach the asset location
   - **View steps** and **Scan asset** options are displayed.
8. **Optional:** To view the route to the asset location, tap **View steps**.
9. After reaching the asset location, pick the asset.
10. Complete the Asset pick task.

    a. Tap **Scan asset**.

    b. Provide the asset tag information.
       - To provide the information through a scan, scan the asset tag of the asset.
       - To provide the information manually, enter a value in the **Asset tag** field.

    c. **Optional:** In the **Drop off location** field, select the space within the stockroom where you want to drop off the asset that you picked.

    d. Select **Close complete**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The state of the Asset pick task changes to Closed complete.
- The **Location** field of the asset is updated with the drop off location only if you have specified the drop off location.
- The Hardware Asset request flow and Hardware Refresh request flow proceed to the next stage.

Manage asset put away using the ServiceNow Agent application

Scan and put away the assets from the receiving bay in the designated aisle-space using the ServiceNow Agent application.

Put away assets using the ServiceNow Agent application

Scan available assets in the inventory and perform an asset put away task in the designated scanned drop-off location.

Before you begin

Role required: inventory_user

About this task

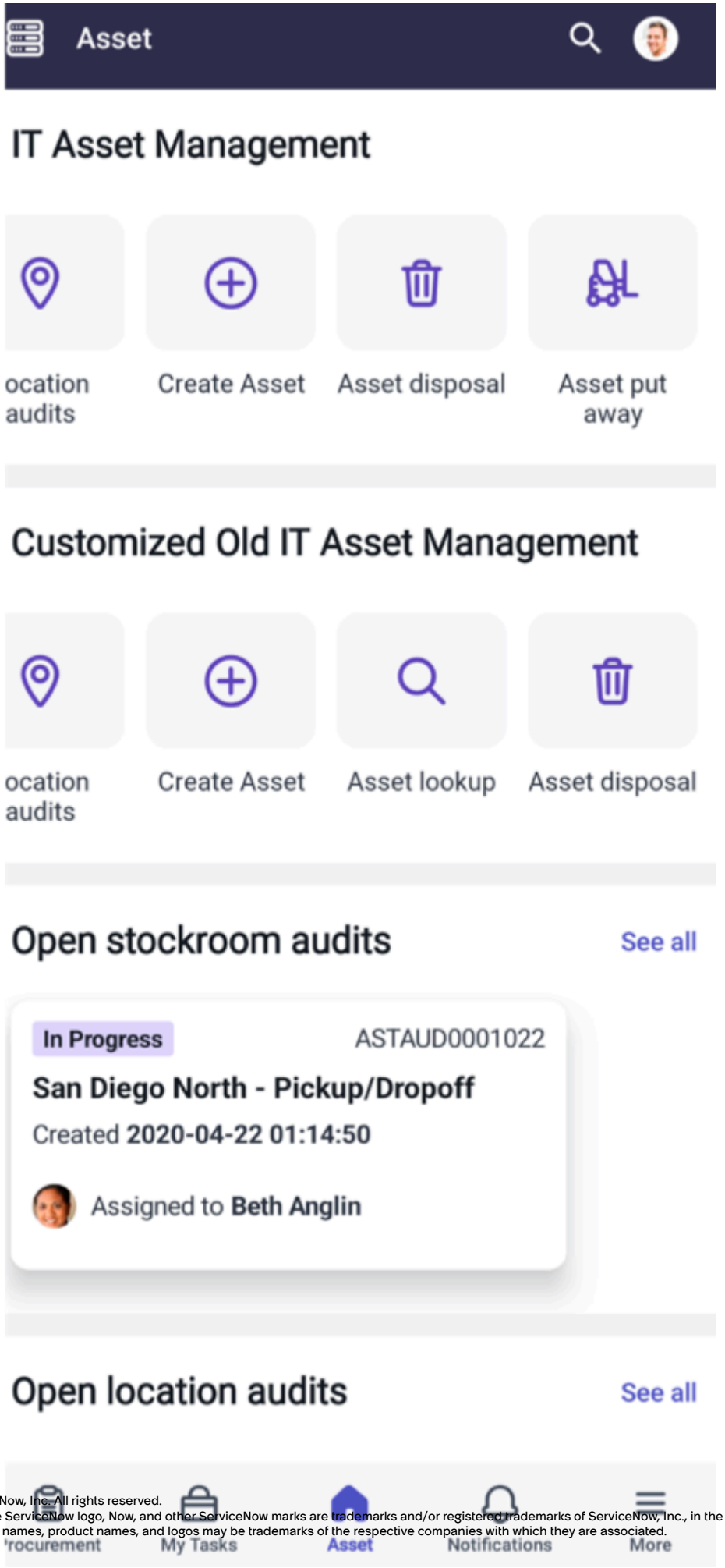
The inventory user can scan the available assets in the inventory and put them away in the scanned aisle-space in the stockroom. The Hardware Asset Management application checks the existence of an active put away task for the asset and makes the required update in the Hardware Asset Workspace.

- If an active Asset put away task exists, the task is closed when the asset is placed in the designated stockroom location.
- If an active Asset put away task doesn't exist for the asset, then a task is created and closed when the asset is placed in the designated stockroom location.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar, tap the Asset put away menu.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

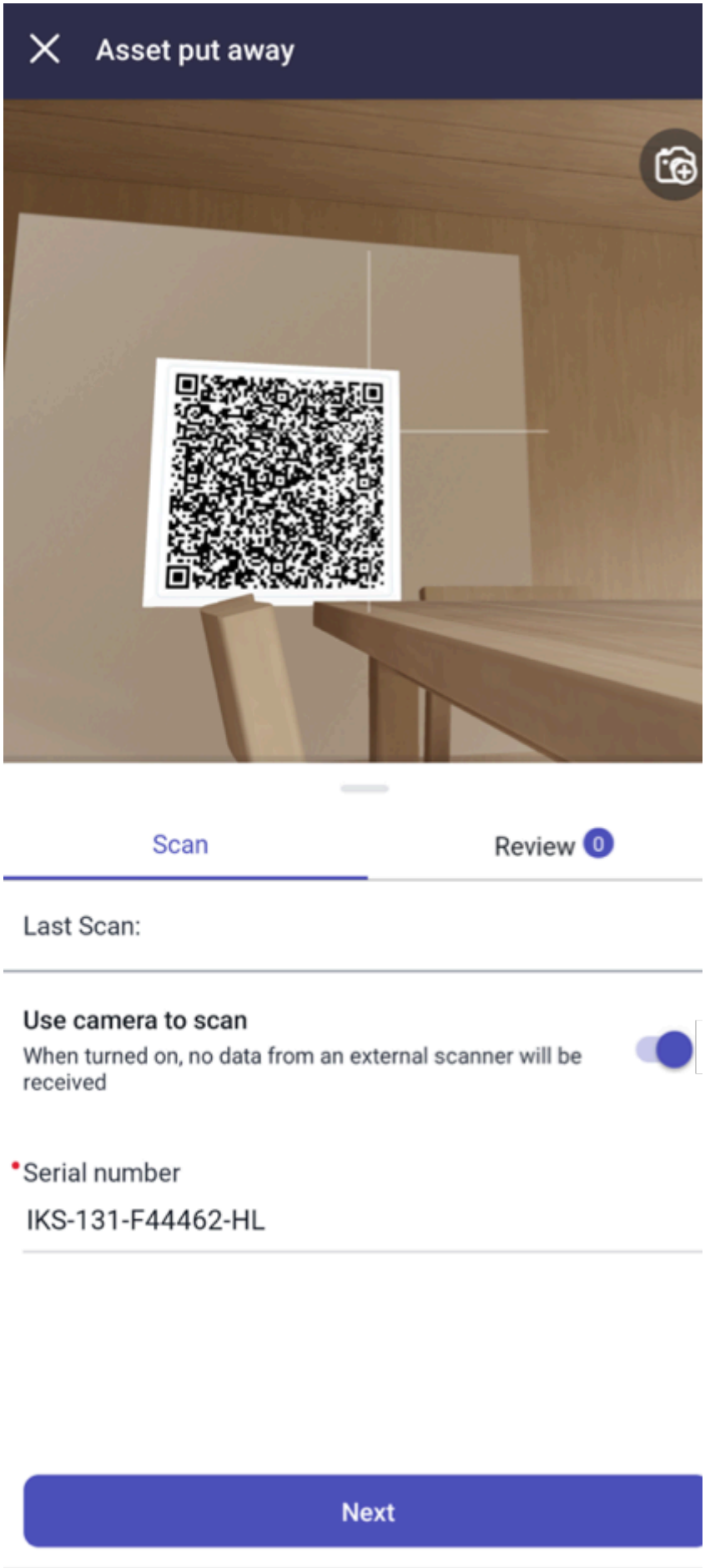


© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Asset put away page is displayed.

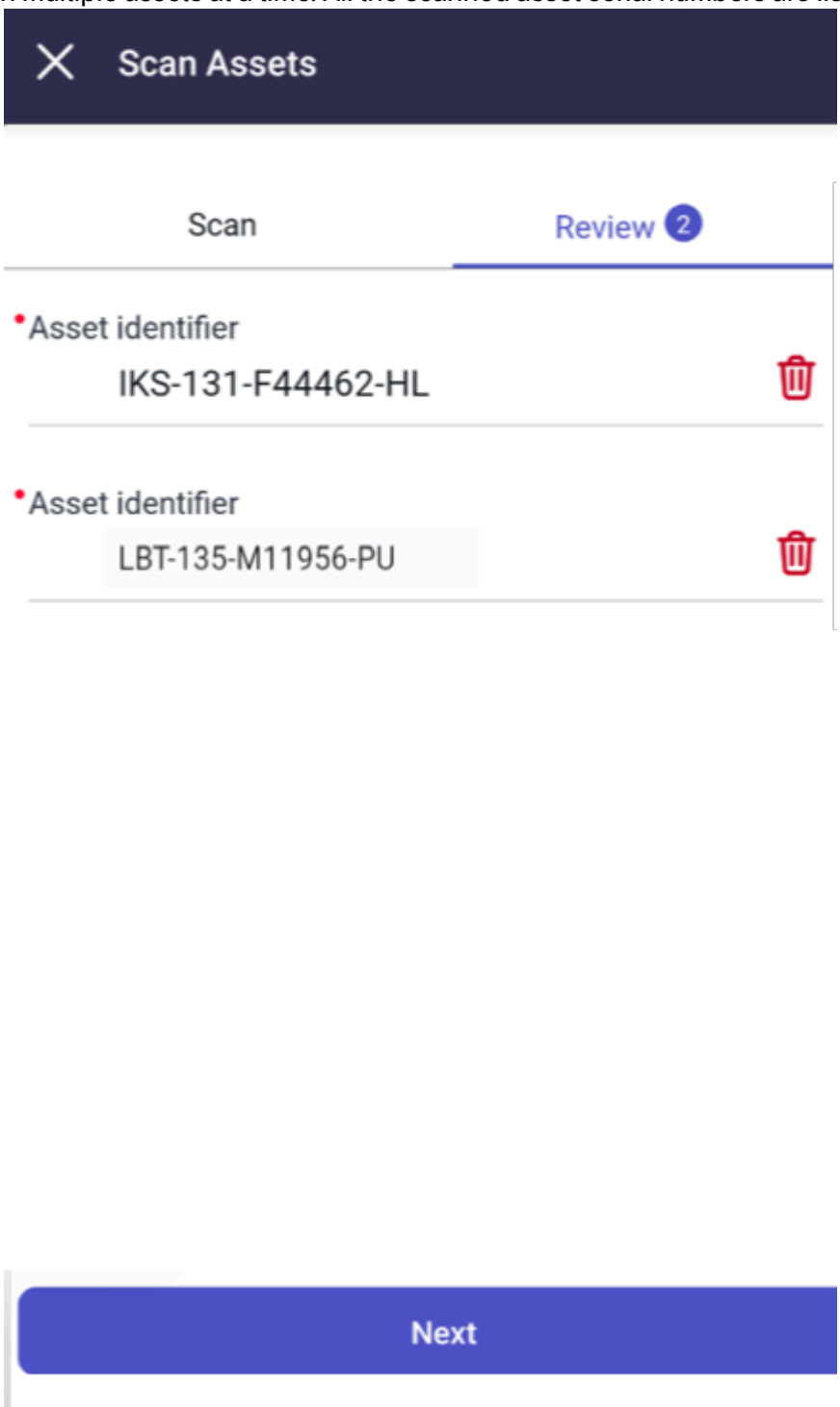
3. Enter or scan the asset serial number and tap **Next**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



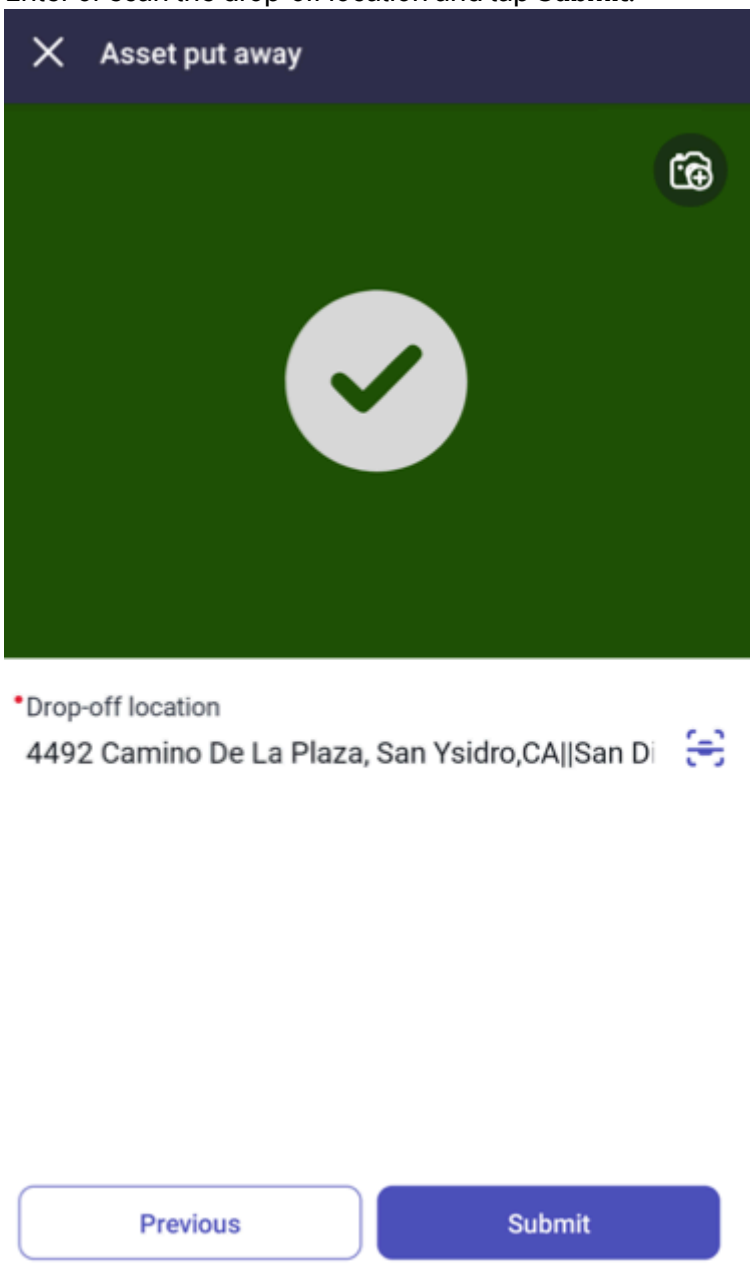
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can scan multiple assets at a time. All the scanned asset serial numbers are listed in the **Review** tab.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Enter or scan the drop-off location and tap **Submit**.



Result
A confirmation message appears on the mobile screen showing the number of put away tasks closed.

Using CMDB success advisor for HAM

As a CMDB administrator, you can use the Hardware Asset Management (HAM) dashboard in CMDB success advisor to keep hardware asset data accurate and aligned with data quality guidelines.

The ServiceNow® CMDB success advisor is a scoped application that drives business outcomes for targeted business products. To learn more, see CMDB success advisor.

1. CMDB success advisor for HAM setup.

   Set up the CMDB success advisor for HAM.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Monitor CMDB data quality for HAM.

   Identify and address data quality issues specific to HAM in the CMDB.

3. Improve CMDB data quality for HAM.

   Use the Remediation actions panel available for a data card in the advisor dashboard for HAM to improve the overall quality of your CMDB.

4. Analyze data integrations for HAM.

   Improve HAM data coverage by analyzing existing and suggested data integrations, including Discovery patterns and Service Graph Connectors.

5. Analyze CMDB settings for HAM.

   Monitor and optimize CMDB settings that support CI-to-asset synchronization, life cycle alignment, and HAM data quality.

Related topics

Hardware Asset Management

Access CMDB success advisor

Supported business outcomes

HAM model category recommendations

CMDB success advisor analyzes hardware asset data in your instance to recommend which model categories should be in your HAM advisor scope.

Recommendations are ranked by asset count: the number of hardware assets in the Hardware [alm_hardware] table associated with each model category. Recommendations always total up to 10 model categories.

You aren't required to accept all recommendations. Recommendations are guidance, and your organization's priorities should drive the final advisor scope selection.

Ranking logic

How recommendations are generated depends on whether the Hardware Asset Management plugin (sn_hamp) is installed and, if so, which resource categories are opted in:

- If the *sn_cmdb_advisor.ham_scope_recommendation_criteria* system property is set to PREDEFINED, CMDB success advisor skips asset-count ranking entirely and recommends the default model categories. See Default model categories.
- If the sn_hamp plugin isn't installed, CMDB success advisor recommends the Computer model category plus the top nine server model categories by asset count. If fewer than 10 model categories result, additional model categories are added from the remaining predefined resource categories to reach 10.
- If the sn_hamp plugin is installed but no resource categories are opted in, no recommendations are generated. Opt in at least one resource category to receive recommendations. See Managing opt-in and opt-out resource categories for HAM in CMDB success advisor.
- If the sn_hamp plugin is installed and neither the Servers nor the End User Computers resource category is opted in, CMDB success advisor recommends the top 10 model categories by asset count across all opted-in resource categories.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If the sn_hamp plugin is installed and the Servers or the End User Computers resource category is opted in, CMDB success advisor recommends the Computer model category (if End User Computers is opted in) plus the top nine server model categories by asset count (if Servers is opted in). If fewer than 10 model categories result, additional model categories are added from the remaining opted-in resource categories to reach 10.

Note: Model categories with zero assets are never recommended.

Default model categories

If asset-count ranking produces no results, or if the *sn_cmdb_advisor.ham_scope_recommendation_criteria* system property is set to `PREDEFINED`, CMDB success advisor recommends this fixed set of model categories instead:

- Computer
- Server
- Linux Server
- Windows Server
- Network Gear

CMDB success advisor for HAM setup

Use the CMDB success advisor application to configure and manage the CMDB success advisor for Hardware Asset Management (HAM).

Plugins and dependencies

Review the CMDB success advisor application listing in the ServiceNow Store for information about dependencies, licensing or subscription requirements, and release compatibility.

Set up overview

1. Manage opt in HAM resource categories.

   Opt in to Hardware Asset Management (HAM) license resource categories to make the corresponding model categories available for selection in CMDB success advisor for HAM.

2. Get started with CMDB success advisor setup for HAM.

   Set up your HAM specific advisor dashboard by selecting model categories to define the HAM advisor scope.

3. Manage HAM advisor scope in CMDB success advisor.

   After completing the initial setup, you can continue to improve your CMDB data quality by adjusting model category selection for your current HAM goals.

Related topics

Configuring CMDB success advisor

Hardware Asset Management

Managing opt-in and opt-out resource categories for HAM in CMDB success advisor

You can opt in to Hardware Asset Management (HAM) license resource categories to make the corresponding model categories available for selection in CMDB success advisor for HAM.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you can set up or update the HAM advisor scope in CMDB success advisor, at least one HAM license resource category must be opted in. Resource categories define the hardware types, such as Servers, Storage, or Mobile Device, covered by your HAM subscription. Only model categories belonging to opted-in resource categories appear in the CMDB success advisor for HAM.

The opted-in resource categories are set to `true` in the HAM Resource Category [sn_hamp_resource_category] table. For more information, see Opt-in or opt-out of HAM license resource categories.

Model category availability based on opt-in status

The opt-in status of resource categories determines which model categories are available in the HAM advisor.

The following table describes the HAM advisor behavior based on opt-in status.

Model category availability by opt-in status

Status	Advisor behavior
No resource categories opted in	The Select model categories dialog box displays a message indicating that no categories are currently available. You must opt in to at least one resource category before you can configure or update the HAM advisor scope.
Resource categories opted in	The corresponding model categories appear in the **Available resource and model categories** column of the Select model categories and Edit dashboard scope dialog boxes and can be selected for the HAM advisor scope.
Resource category opted out after selection	Model categories from that resource category are no longer available in the advisor. If those categories were previously selected for the HAM advisor scope, they may become unavailable and the dashboard scope may be reduced.

Opt in HAM resource categories

Select HAM resource categories to make their model categories available for configuration in CMDB success advisor.

Before you begin

Role required: ham_admin

Procedure

1. On the CMDB success advisor landing page, select **Select model categories** within the HAM card.
   For more information about the CMDB success advisor landing page, see Viewing the CMDB success advisor landing page. For information about other ways to access CMDB success advisor, see Access CMDB success advisor.
2. If the dialog box displays **No model categories available**, select **Opt in categories**.
   The HAM license resource categories management page opens.
3. Select the resource categories included in your HAM subscription and opt them in.
4. Return to CMDB success advisor and proceed with selecting model categories.
   For more information, see Getting started with HAM advisor dashboard setup.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Remove opted-out HAM resource categories

When a resource category is opted out in HAM, its model categories remain in CMDB success advisor until you manually remove them.

Before you begin

A message is displayed in the advisor indicating that opted-out resource categories are part of the current scope.

Role required: ham_admin

Procedure

1. On the CMDB success advisor landing page, select **Edit dashboard scope** within the HAM card.
   For more information about the CMDB success advisor landing page, see Viewing the CMDB success advisor landing page. For information about other ways to access CMDB success advisor, see Access CMDB success advisor.
2. In the **Available resource and model categories** column, locate the opted-out resource category and clear its check box.
3. Select **Save**.

Result

Removing an opted-out resource category excludes all model categories associated with it from the HAM advisor scope and reduces the scope of your HAM advisor dashboard accordingly.

Getting started with HAM advisor dashboard setup

The HAM advisor dashboard can be configured automatically on installation or upgrade, or manually through the CMDB success advisor landing page.

The HAM scope defines which model categories CMDB success advisor monitors for HAM data quality. The selected categories determine the scope of the HAM advisor dashboard, including the KPIs, data integrations, and settings that are tracked.

Important: To determine which model categories to select, review the count of operational assets under each category in the Hardware Asset Workspace, or consult with your IT Asset Management (ITAM) or HAM administrator for guidance. See Hardware Asset Workspace.

Prerequisites

- Obtain entitlement for HAM. See Hardware Asset Management licensing.
- Opt in HAM resource categories. See Managing opt-in and opt-out resource categories for HAM in CMDB success advisor.

Roles required

Role required: sn_cmdb_admin

Automatic setup

When you install or upgrade CMDB success advisor, the *CMDB Advisor - Auto Setup* on-demand scheduled job can automatically configure the HAM advisor dashboard if all eligibility conditions are met. Open the CMDB success advisor landing page to confirm the dashboard setup state before proceeding manually.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information about eligibility conditions and the auto-setup process, see Automatic dashboard setup for HAM in CMDB success advisor.

Manual setup

If auto-setup did not run or the eligibility conditions were not met, configure the dashboard manually by selecting model categories on the CMDB success advisor landing page.

For instructions, see Set up the HAM advisor dashboard manually.

Automatic dashboard setup for HAM in CMDB success advisor

CMDB success advisor can automatically configure the HAM advisor dashboard after installation or upgrade, providing immediate access to pre-configured hardware asset insights without selecting model categories manually.

Auto-setup process

When you install or upgrade CMDB success advisor, the *CMDB Advisor - Auto Setup* on-demand scheduled job configures the Hardware Asset Management (HAM) advisor dashboard automatically. The job checks eligibility conditions, applies the model category scope, creates the HAM content template, and triggers initial data collection.

After data collection completes, users with the sn_cmdb_admin role receive a notification with a link to the configured dashboard.

The dashboard card on the CMDB success advisor landing page displays a badge with the number of model categories that auto-setup selected.

The badge remains after you open the dashboard for the first time. Manually editing the model category scope through **Edit dashboard scope** removes the badge.

Eligibility conditions

Auto-setup runs only when all the following conditions are met:

- The instance has a HAM entitlement. See Hardware Asset Management licensing.
- The CMDB success advisor for HAM setup isn't yet complete.
- The total number of CIs on the instance is fewer than 5 million.
- If the Hardware Asset Management plugin (sn_hamp) is installed, at least one HAM resource category is opted in. See Managing opt-in and opt-out resource categories for HAM in CMDB success advisor.
- The *com.snc.task.principal_class_filter* system property is empty, or at least one principal class already exists on the instance.

Note: If any condition isn't met, you can configure the HAM advisor dashboard manually.

Scope selected by auto-setup

If no principal classes exist yet, auto-setup selects the top 5 recommended HAM model categories, ranked primarily by asset count. For more information, see HAM model category recommendations.

If one or more principal classes already exist, auto-setup instead adopts whichever of those classes are hardware classes with an opted-in resource category. There's no minimum or maximum count in this case. Auto-setup doesn't run if none of the existing principal classes qualify.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For each selected model category, auto-setup also marks the corresponding CI class as a principal class so the class appears in CI selection filters on incident, change, and problem forms.

Data collection and notifications after auto-setup

After auto-setup completes, data collection begins automatically. Data collection runs monthly and changes to daily after you open the dashboard for the first time.

The *CMDB Advisor - Check Job Completion and Notify* scheduled job checks whether data collection has completed. When collection completes, the job sends a notification to users with the sn_cmdb_admin role that includes a link to the configured dashboard. After all notifications are sent, the job is deactivated.

When you first open the HAM advisor after auto-setup completes, a notification indicates that the advisor is ready and shows the number of model categories automatically selected based on asset footprint.

This notification lets you refresh the dashboard view from anywhere in the ServiceNow AI Platform, including the CMDB success advisor landing page. You can also check HAM setup progress from the side panel in the Governance view of Service Graph Workspace. For more information about accessing the Governance view, see Access CMDB success advisor.

Reviewing and modifying the auto-setup scope

You can review and update the model categories selected by auto-setup at any time.

For instructions on updating model categories, see Optimize the HAM advisor dashboard.

Set up the HAM advisor dashboard manually

If the HAM advisor dashboard was not configured automatically, set it up manually by selecting the model categories that define the HAM scope.

Before you begin

Role required: sn_cmdb_admin

Procedure

1. On the CMDB success advisor landing page, select **Select model categories** within the HAM card.
   For more information about the CMDB success advisor landing page, see Viewing the CMDB success advisor landing page. For information about other ways to access CMDB success advisor, see Access CMDB success advisor.
2. On the Select model categories dialog box, select a resource category to choose all its model categories or expand a resource category to select individual categories, then move them from the **Available resource and model categories** column to the **Selected** column.

   Note: If the Select model categories dialog box shows **No model categories available**, select **Opt in categories** to opt in at least one HAM license resource category, then return to this step.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Model category selection actions

Purpose	Action	Data coverage
Add an available resource category	Select the check box for the resource category to include all its model categories.	Includes all model categories associated with the selected resource category.
Expand model category selection	Select **>** to expand a resource category, then select check boxes for specific model categories.	Includes only the selected model categories associated with a resource category.
Narrow down model category selection	Select **>** to expand a resource category, then clear check boxes for specific model categories.	Excludes only the model categories cleared from a resource category.
Remove an opted-out or available resource category	Clear the check box for the resource category.	Excludes all model categories associated with the removed resource category.
Remove a selected model category	Select the X icon next to the category in the **Selected** column or clear the check box for the category	Model category is removed from scope.

Tip: You can use the **Search** field to find specific categories. You can select up to 200 model categories.

3. Select **Done** to build the CMDB success advisor for HAM dashboard.

Result

The HAM data collection begins immediately via the *CMDB Advisor - HAM Daily Data Collection* scheduled job. The HAM advisor dashboard is populated after data collection completes. The scheduled job then continues running on a daily basis.

Until this initial data collection completes, dashboard cards indicate that no data is available and let you refresh to check again.

After manual setup, once initial data collection completes, you receive a notification indicating that insights for the selected model categories are ready for review.

To update the scope after initial setup, select **Edit dashboard scope** on the HAM advisor dashboard.

Manage HAM advisor scope in CMDB success advisor

Manage the scope of your advisor for Hardware Asset Management (HAM) by editing model categories in CMDB success advisor to support your targeted HAM outcomes.

Before you begin

Role required: sn_cmdb_admin

About this task

Control which resource and model categories are included in the HAM advisor dashboard in CMDB success advisor. Add or remove entire resource categories, or include or exclude specific model categories within a resource category. Resource categories can be opted in or out based on hardware asset manager preferences.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. On the HAM advisor dashboard, select **Edit dashboard scope**.
2. In the Edit dashboard scope dialog box, add or remove categories to update the model category selection.

Model category selection actions

Purpose	Action	Data coverage
Add an opted-in resource category or an available resource category	Select the check box for the resource category to include all its model categories.	Includes all model categories associated with the selected resource category.
Expand model category selection	Select **>** to expand a resource category, then select check boxes for specific model categories.	Includes only the selected model categories associated with a resource category.
Narrow down model category selection	Select **>** to expand a resource category, then clear check boxes for specific model categories.	Excludes only the model categories cleared from a resource category.
Remove an opted-out or available resource category	Clear the check box for the resource category.	Excludes all model categories associated with the removed resource category.
Remove a selected model category	Select the X icon next to the category in the Selected column.	Model category is removed from scope.

3. If a confirmation check box appears under **Review and confirm changes**, select the check box.

   The check box appears only when the *com.snc.task.principal_class_filter* system property is set and your selection has an unsaved change.

   The check box label states how many model categories you're adding and removing. It also notes that added categories mark their CI classes as principal, which can affect CI filtering for incident, problem, and change (IPC) tasks.

   Done stays disabled until you select the check box. Changing your selection again clears the check box and disables **Done** until you select it again.

   Selecting the check box enables **Done**.
4. Select **Done** to apply the changes.

Result

The HAM dashboard in CMDB success advisor is updated to reflect the data based on the model category selection. Dashboard metrics refresh once daily when the *CMDB Advisor - HAM Daily Data Collection* scheduled job runs. The scheduled job invokes the *CMDB success advisor data collection for HAM* Performance Analytics job to recalculate the pre-aggregated indicators used throughout the dashboard. For more information about Performance Analytics jobs, see Collecting indicator scores. Changes to your model category selection appear in the dashboard metrics after this job's next run, not immediately. For the full list of CMDB success advisor scheduled jobs, see Components installed with CMDB success advisor.

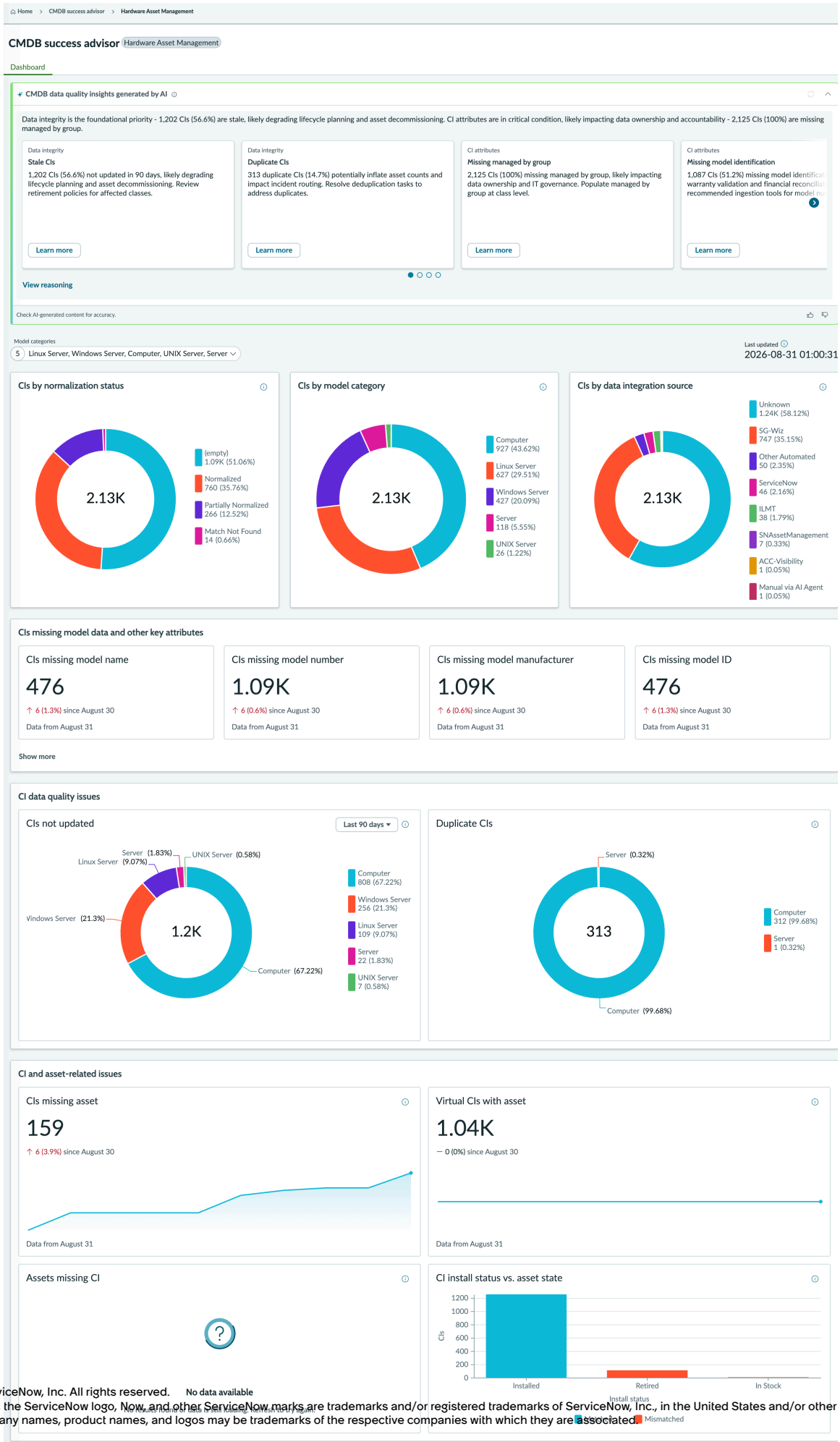
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Monitoring CMDB data quality using dashboard metrics in CMDB success advisor for HAM

The CMDB success advisor for HAM dashboard enables CMDB administrators to identify and address data quality issues specific to HAM in the Configuration Management Database (CMDB).

Important: Charts display up to the top 10 values. Any remaining values are grouped into an **Others** category. When you select a segment or count on a chart from a CMDB success advisor dashboard, the KPI Details page opens. On the page, you can analyze how a specific metric trends over time. Additionally, the Remediation actions panel appears when remediation actions are available for that card. Use the panel to improve the quality of CMDB. To learn more, see KPI Details and Improving CMDB data quality for HAM.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If the Performance Analytics data collector exceeds its row limit during data processing, a notification banner appears on the dashboard indicating that some metrics could not be loaded. For more information, see Data collector Performance Analytics properties.

Access the dashboard

To open the dashboard, select **View insights** for HAM on the CMDB success advisor landing page. See Access CMDB success advisor. The dashboard displays a **Last updated** timestamp reflecting the completion time of the most recent HAM data collector job run.

Note: The CMDB success advisor for HAM dashboard is available only after the setup process is complete. For more information, see CMDB success advisor for HAM setup.

Required roles

Roles required for CMDB success advisor for HAM dashboard

Role	Description
sn_cmdb_admin	Required to access the dashboard.
sn_cmdb_user	Provides read-only access to CMDB success advisor pages and data, including the AI-generated summary of the dashboard.
sn_cmdb_editor	Provides the same dashboard access as sn_cmdb_user, with write access on CMDB records outside the application.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

User	Dashboard use
CMDB administrator	• Gain real-time visibility into hardware asset data quality and completeness • Identify missing or incorrect CI attributes quickly • Detect duplicate CIs and unlinked assets • Monitor asset life cycle status (installed, retired, inactive) • Prioritize and track data cleanup and remediation tasks • Verify that the CMDB stays accurate to support HAM

Dashboard features

The dashboard provides clear, consolidated insights into hardware asset data quality and asset status. Use the dashboard to identify and resolve data quality issues within the CMDB through

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

dedicated sections, filters, indicators, and visual reports. Gain valuable insights into CMDB performance related to HAM.

Targeted CMDB metrics focus remediation efforts. Regularly monitor these metrics and follow suggested remediation actions to systematically improve CMDB data quality over time.

Important: The dashboard data is filtered based on the Selected model categories and Date range filters. See Filters.

Feature description

Feature	Description
CMDB data quality insights generated by AI	Displays an AI-generated summary of CMDB data quality for HAM outcomes and lists the top 5 issues with guided remediation actions. Issues are ranked primarily by the percentage of CIs or CI classes that each issue affects, not by severity, within five categories, in this order: **Data integrity**, **CI attributes**, **CI-asset relationships**, **Business rules**, and **Data Manager policies**. Foundational data integrity issues, such as duplicate CIs and stale CIs, are evaluated first because they can inflate the counts behind other issues. A percentage gap of more than 15 points between issues in the same category can change their default order. A percentage gap of more than 40 points between issues in different categories can also change their default order. For the reasoning behind the ranking and recommendations, see Summarize CMDB readiness with the ServiceNow Otto skill. Select **View reasoning** to open the *Reasoning* popover, which explains the ranking and includes a **Learn more** link to the same topic. **Note:** Available only when the summarize CMDB readiness skill is configured. See Configure the summarize CMDB readiness skill.
CIs by normalization status	Displays the breakdown of operational CIs by HAM normalization status to indicate how much of the CMDB is normalized against the hardware product model catalog.
CIs by model category	Displays the breakdown of operational CIs by associated model category to highlight CI distribution in the CMDB.
CIs by data integration source	Displays the breakdown of operational CIs by data integration source to highlight their contribution to CMDB population.
CIs missing model data and other key attributes	Displays key metrics related to CIs missing model details, ownership, and other key attributes, leading to incomplete records and operational inefficiencies.
CI data quality issues	Displays key metrics related to CIs that have not been updated or may have duplicate records, leading to outdated information and inconsistencies in the CMDB.
CI and asset-related issues	Displays key metrics related to mismatches and missing links between CIs and assets, leading to incomplete asset life cycle tracking and reporting issues.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Filters

Filters enable narrowing the data shown in graphs and metrics based on model category, date range, or stale CI threshold.

Name	Type	Description
Model categories	List	Filters CIs based on the selected model categories.
Date range	Date	Filters the dashboard data based on the selected date range.
Stale CI	List	Filters stale CIs based on the number of days since their last update. Available values: 7, 14, 30, 60, and 90 days.

Select **Reset filters** to clear all filter selections and restore the dashboard to its default view.

Note: You need the pa_viewer role to use the filters, including **Reset filters**.

CIs missing model data and other key attributes

Displays key metrics related to CIs missing model details, ownership, and other key attributes, leading to incomplete records and operational inefficiencies.

CIs missing model data and other key attributes section

Card	Description	Indicators
CIs missing model name	Operational CIs not associated with a model ID or associated with a model ID missing a name.	CIs missing model name
CIs missing model number	Operational CIs not associated with a model ID or associated with a model ID missing a model number.	CIs missing model number
CIs missing model manufacturer	Operational CIs not associated with a model ID or associated with a model ID missing a manufacturer.	CIs missing manufacturer
CIs missing model ID	Operational CIs not associated with a model ID.	CIs missing model ID
CIs missing assigned to	Operational CIs not assigned to a specific user, leading to unclear ownership and delayed action.	CIs missing assigned to
CIs missing location	Operational CIs not associated with a location, leading to gaps in asset tracking and service mapping.	CIs missing location
CIs missing managed by group	Operational CIs not managed by a specific ownership group, leading to inefficient support assignment and operational risk.	CIs missing managed by group
CIs missing serial number	Operational CIs missing a serial number, leading to issues with duplicate identification.	CIs missing serial number

Note: The percentage change comparison on the cards in this section covers the most recent 6 months of data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tip: Select **Show more** in the CIs missing model data and other key attributes section to view all the cards.

CI data quality issues

Displays key metrics related to CIs that haven't been updated or may have duplicate records, leading to outdated information and inconsistencies in the CMDB.

CI data quality issues section

Card	Description	Indicators
CIs not updated	Operational CIs not updated, causing data gaps and inaccuracies in the CMDB. When you select a segment on the CIs not updated chart, the KPI Details page title reflects the Stale CI filter value selected at the time. For example, CIs not updated in last 30 days.	CIs not updated in last 7 days CIs not updated in last 14 days CIs not updated in last 30 days CIs not updated in last 60 days CIs not updated in last 90 days **Note:** The CIs not updated card data is additionally filtered based on the Stale CI filter. See Filters.
Duplicate CIs	Operational CIs identified as duplicates based on key matching attributes, causing data redundancy.	Duplicate CIs

CI and asset-related issues

Displays key metrics related to mismatches and missing links between CIs and assets, leading to incomplete asset life cycle tracking and reporting issues.

Note: The KPI Details trend chart for the CIs missing asset, Virtual CIs with asset, and Assets missing CI cards covers the most recent 6 months of data.

CI and asset-related issues section

Card	Description	Indicators
CIs missing asset	Operational CIs not associated with an asset record, leading to incomplete asset life cycle tracking.	CIs missing asset
Virtual CIs with asset	Virtual assets created for virtual CIs that are operational, leading to inaccurate consumption of HAM licenses.	Assets created for virtual CIs

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

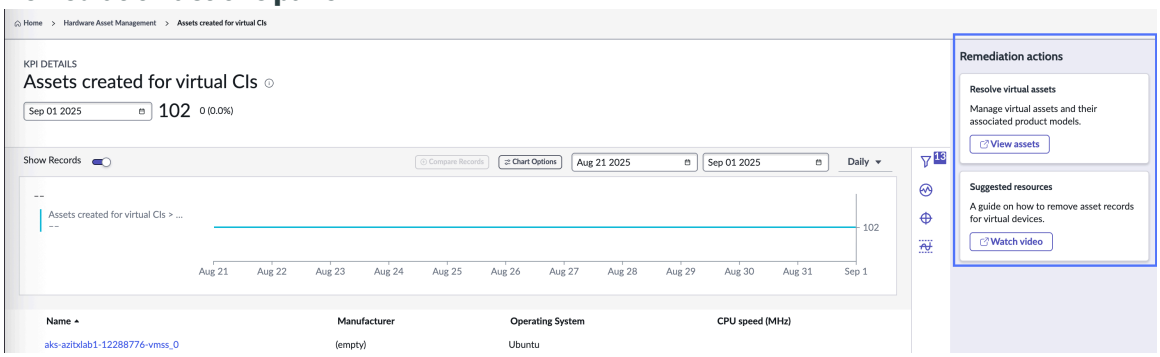
CI and asset-related issues section (continued)

Card	Description	Indicators
Assets missing CI	Assets without a matching CI, caused by CIs not being discoverable on the network.	Assets missing CI
CI install status vs. asset state	All CIs where the install status matches or differs from the corresponding asset state. Available only on instances where the CSDM Activation plugin (com.snc.cmdb.csdm.activation) is not active.	CI install status vs. asset state matched CI install status vs. asset state mismatched
CI life cycle stage vs. asset life cycle stage	All CIs where the life cycle stage matches or differs from the corresponding asset life cycle stage. Available only on instances where the CSDM Activation plugin (com.snc.cmdb.csdm.activation) is active.	CI lifecycle stage vs. asset lifecycle stage matched CI lifecycle stage vs. asset lifecycle stage mismatched

Improving CMDB data quality for HAM

The Remediation actions panel available for a chart in the CMDB success advisor dashboard for Hardware Asset Management (HAM) suggests targeted actions to improve the overall quality of your Configuration Management Database (CMDB).

Remediation actions panel



When remediation actions are available for a chart, the Remediation actions panel appears on the KPI Details page.

You can perform the actions suggested within the Remediation actions panel to address HAM data quality issues in the CMDB. These actions help improve the accuracy, consistency, and usability of configuration items (CIs), promoting better alignment with HAM.

The Remediation actions panel:

- Improves CMDB data quality through guided actions
- Suggests context-aware actions
- Supports quick, informed remediation steps

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Focuses attention on meaningful tasks
- Appears only when actionable insights are available

Accessing the Remediation actions panel

To open the Remediation actions panel, select a segment or count on a chart in the CMDB success advisor dashboard for HAM. The KPI Details page opens. If the remediation actions are available for the selected data, the panel appears on the details page suggesting various remediation actions.

Available remediation actions

The Remediation actions panel provides relevant suggestions and actions based on the information in the selected chart. For example, if the chart shows CIs that weren't updated recently, the panel displays a suggestion to review retirement policies.

The remediation actions are available for the improvement of the following issues:

CIs with invalid or unpopulated names

Identify and correct CIs that lack meaningful or complete naming, which can impact discovery and asset alignment.

CIs with missing model entries

Resolve CIs missing any model-related data in the CMDB, including model ID, model name, model number, and manufacturer, all of which are essential for normalization and life cycle tracking.

Stale CIs

Remove or update CIs that weren't updated or discovered for an extended period, helping maintain an accurate representation of your environment.

Duplicate CIs

Remove or merge duplicate records to avoid data fragmentation and promote a single source of truth.

Virtual CIs with asset

Identify and remove hardware assets incorrectly created for virtual CIs, which can lead to inaccurate HAM license consumption and reporting.

CIs missing serial number

Identify and resolve CIs that have no assigned serial number, which can affect duplicate detection and hardware asset tracking.

CIs missing location

Identify and resolve CIs that have no assigned location, which can cause gaps in asset tracking and service mapping.

CI and asset state mismatch

Identify and resolve CIs where the installation status does not align with the corresponding asset state, which can lead to inaccurate asset life cycle reporting.

CIs missing key attributes covered by an SGC

Configure the recommended Service Graph Connectors to capture missing attribute data. Recommendations are limited to CI classes directly mapped to each connector and exclude Operational Technology connectors.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Analyzing data integrations for improving HAM data coverage

Improve HAM data coverage by analyzing existing and suggested data integrations, including Discovery patterns and Service Graph Connectors.

Use the **Data integrations** tab in the CMDB success advisor for HAM to assess the effectiveness of your current data integration sources in the Configuration Management Database (CMDB) and identify opportunities to improve HAM data coverage. The **Data integrations** tab provides a breakdown of active Discovery patterns and installed Service Graph Connectors, including how many key configuration item (CI) attributes each integration source is populating.

Access data integrations

Navigate to the CMDB success advisor , and on the HAM card, select **View insights**. Select the **Data integrations** tab. To access the dashboard, see Access CMDB success advisor .

Note: The CMDB success advisor for HAM dashboard is available only after the setup process is complete. For more information, see CMDB success advisor for HAM setup.

Required roles

Roles required for accessing data integration sources in the CMDB success advisor for HAM

Role	Description
sn_cmdb_admin	Required to access the CMDB success advisor.
cmdb_inst_admin	Required to manage Service Graph Connector connections in SGC Central.
pd_admin	Required to manage Discovery patterns with create and write access.
pd_user	Required to view Discovery patterns with read-only access.
pd_mid	Required to view Discovery and Service Mapping Patterns with read-only access.

Use cases

For examples of how different people in your organization would use this feature, see these use cases.

User	Feature use
CMDB administrator	• Identify an inactive Discovery pattern that can populate attribute data for hardware assets. • Identify a Service Graph Connector relevant to hardware assets that is installed but without any active connections. • Prioritize which hardware-related integrations to improve to maximize CMDB data quality for improving the completeness, accuracy, and reconciliation of hardware asset records.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Data integration features

Feature description

Feature	Description
Integration overview	Displays the count of all Discovery patterns and Service Graph Connectors contributing hardware asset data to the CMDB.
Status indicators	Check whether Discovery patterns are active and Service Graph Connectors are installed with active connections. For more information, see Reviewing data integrations for HAM.
Attribute coverage insights	Select the **Attribute coverage** link next to the integration to review which hardware asset attributes are populated by a Discovery pattern or Service Graph Connector. For more information, see Evaluate HAM data integration coverage.
Access integration details	Configure integrations to improve attribute coverage. For more information, see Evaluate HAM data integration coverage.

Reviewing data integrations for HAM

Review both existing and suggested Discovery patterns and Service Graph Connectors to improve your HAM data coverage.

The **Data integrations** tab in CMDB success advisor for HAM provides insight into current integration usage for Discovery patterns and Service Graph Connectors. To make sure your CMDB is being correctly populated with high-quality HAM data, check the status of both integration types.

Integration types

The **Data integrations** tab displays two key data sources that support HAM:

Discovery patterns

Discovery patterns identify IT infrastructure components through network-based discovery.

To evaluate Discovery pattern effectiveness for HAM, review the fields as described in the following table.

Fields to monitor for Discovery pattern

Field	Description
Status	Indicates whether a Discovery pattern is currently active. Only active patterns contribute data to the CMDB.
Attribute coverage	Displays how many HAM relevant attributes within a model category are being populated by each pattern.
View pattern	Opens the Discovery pattern configuration, enabling you to inspect or refine the logic, identification rules, and targeted CI classes.

Low attribute coverage might occur if the Discovery pattern is limited in scope, not collecting detailed CI information, or if its identification rules are not aligned with the actual devices in your network. In such cases, required hardware attributes may be missing from the resulting CI records.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Service Graph Connectors

Service Graph Connectors import asset and CI data from third-party platforms.

To evaluate Service Graph Connectors effectiveness, review the fields as described in the following table.

Field	Description
Installed	Indicates whether the connector is deployed. A value of `Yes` confirms it is installed and available for use.
Attribute coverage	Displays how many HAM relevant attributes within a model category are being populated by each connector.
Active connections	Represents the number of connections actively importing data into the CMDB.
Inactive connections	Displays connections that are configured but not currently importing data and may need troubleshooting.

If a Service Graph Connector shows low attribute coverage or no active connections, it may indicate that the specific version being evaluated has limited attribute coverage. This can happen if the connector is installed but not fully mapped to populate key attributes or if the data source is unavailable or misconfigured. As a result, critical hardware data, such as serial numbers, models, or manufacturers, may not be imported into the CMDB, affecting the completeness and reliability of asset records.

Evaluate HAM data integration coverage

Identify supported model categories and attributes from a Discovery pattern or Service Graph Connector to evaluate data coverage and upgrade requirements.

Before you begin

Role required: sn_cmdb_admin

Procedure

1. Navigate to the CMDB success advisor landing page.
2. On the HAM card, select **View insights**.
3. Select the **Data integrations** tab.
4. Find the Discovery pattern or Service Graph Connector by selecting the respective cards.
5. Identify the status of your Discovery patterns and Service Graph Connectors to improve CMDB data coverage.
6. Select the **Attribute coverage** link for a data integration source.
7. In the Supported model categories and attributes dialog box, review the attribute coverage details for model categories.
   The following details are available:
   - Integration suggested vs. installed version
   - Supported CI classes identified as model categories
   - List of attributes and whether each is supported by the selected data integration source
8. **Optional:** When installed version is lower than the suggested version, select the **View available version** link to open the Application manager.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The **View available version** link is available only when applicable for a data integration source. Also, only users with the admin role can install or upgrade an application. See Application Manager.

9. Determine which hardware asset attributes are being populated by the integration and whether an upgrade is needed to improve the data coverage.
   Available options for improving the data coverage are:
   - For Discovery patterns, you can perform the following actions based on the applicable criteria:
     - If you have the pd_user, you can select **View pattern** for a Discovery pattern to view the pattern. For more information, see Patterns and horizontal discovery.
     - If you have the pd_admin role, you can select **View pattern** for a Discovery pattern to understand its contribution and modify the pattern to maximize the attribute coverage. For more information, see Patterns and horizontal discovery.
   - For Service Graph Connectors, if you have the cmdb_inst_admin role, you can perform the following actions based on the applicable criteria:
     - Select **Install connector** to add a connector from the ServiceNow Store.
     - Select **Create connection** to configure a Service Graph Connector from SGC Central. For more information, see Create a connection for a Service Graph Connector in SGC Central.
     - Select **View connections** to open and review details of existing installed connections importing hardware asset data within SGC Central. For more information, see Viewing connections for a Service Graph Connector in SGC Central.

Analyzing CMDB settings for HAM

Monitor and optimize Configuration Management Database (CMDB) settings that support configuration item (CI) to hardware asset synchronization, life cycle alignment, and Hardware Asset Management (HAM) data quality.

Use the **Settings** tab in the CMDB success advisor for HAM to review configuration indicators and identify opportunities to improve CMDB alignment with HAM guidelines.

The CMDB success advisor for HAM evaluates your current configuration across key areas such as:

- Automatic asset and CI creation
- Field and model category mappings
- CI state and substate usage
- CMDB Data Manager policy coverage

Settings are categorized as `Ideal` or `Requires attention`, enabling you to prioritize actions and maintain a healthy CMDB for HAM.

Access settings

Navigate to the CMDB success advisor landing page and for the HAM card, select **View insights**. Select the **Settings** tab to access settings-related details. For more information, see Access CMDB success advisor.

Note: The CMDB success advisor for HAM dashboard is available only after the setup process is complete. For more information, see CMDB success advisor for HAM setup.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Required roles

You need the sn_cmdb_admin role to access the CMDB success advisor for HAM.

To manage business rules, change the application scope from CMDB success advisor to Global in the application picker.

Use cases

For examples of how different people in your organization would use this feature, see these use cases.

User	Feature use
CMDB administrator	• Improve the accuracy of asset reconciliation by aligning CI and asset record creation. • Promote consistent asset life cycle management through status field alignment across asset and CI records. • Automate policy-based workflows for asset retirement, deletion, certification, or archival using policy-driven rules. • Standardize hardware model categories to improve normalization processes and reporting accuracy.

Settings features

The **Settings** tab in the CMDB success advisor for HAM provides visibility into key configuration areas that promote accurate synchronization between hardware assets and CIs. These settings include business rules, field mappings, model categories, and Data Manager policies that support automated life cycle management and data integrity. To maintain CMDB data accuracy and HAM integration, regularly review and validate these settings. For more information, see CMDB and HAM settings assessed in the CMDB success advisor.

Evaluate CMDB settings for HAM

Identify and evaluate settings including Hardware Asset Management (HAM) business rules, configuration item (CI) to asset field mappings, hardware model categories, and CMDB Data Manager policies that support synchronization and automation between hardware assets and CIs.

Before you begin

Role required: sn_cmdb_admin

Procedure

1. Navigate to the CMDB success advisor landing page.
2. On the HAM card, select **View insights**.
3. Select the **Settings** tab.
4. Select a status tile to view settings by category.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tile	Description
All	Total number of evaluated settings.
Ideal	Settings that follow general guidelines.
Requires attention	Settings that are inactive, incorrectly config ured, or missing.

5. Evaluate each setting that requires attention and use the available actions to open the related configuration pages and make updates.

Action	Description
Manage rule	Opens the configuration page for the related business rule that automates tasks between assets and CIs.
Manage model categories	Opens the Model categories list page where you can select a model category to review and update mappings between asset model categories and CI classes.
Manage mappings	Opens the Asset CI Field Mappings list page where you can select a CI and review and change how asset fields connect to CI fields to keep data accurate.
Manage policies	Opens the Data Manager overview page where you can create or update policies for different CI classes to automate asset man agement.
Create policy	Opens the New policy form to create a policy for a CI class. The **Create policy** action is available in the policy summary dialog box displayed after se lecting the policy coverage count in the **Class es with active policies** column within the Re view Data Manager policies section.

Tip: Select **Learn more** next to a setting to open a related help topic in a new browser tab or window with additional details about that setting.

6. To view any updated configuration status on the **Settings** tab, select the refresh icon .

Related topics

Administer CMDB Data Manager

Asset and CI management

Model categories

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

CMDB and HAM settings assessed in the CMDB success advisor

The Configuration Management Database (CMDB) and Hardware Asset Management (HAM) settings review provides a configuration-level assessment of the CMDB configuration item (CI) classes and HAM assets for maintaining data accuracy.

Settings overview

Each setting is checked for alignment with suggested business rules and mapping guidelines.

CMDB integration settings

Setting	Description
Create asset on CI insertion	Enables the automatic creation of an asset record when a CI is inserted into the CMDB. Requires the Create Asset on Insert business rule to be active for asset creation to occur during CI insertion.
Update asset fields on CI change	Enables automatic updates to asset records when a related CI is modified. Requires the Update Asset Fields on Change business rule to be active to synchronize CI changes with asset data.
Create CI on asset insertion	Enables the automatic creation of a configuration item when an asset record is added. Requires the Create CI on Insert business rule to be active to reflect asset data in the CMDB.
Update CI on asset update	Enables automatic updates to configuration item records when associated asset data is changed. Requires the Update CI Fields on Change business rule to be active to maintain data consistency.
Review custom model categories	Validates that custom model categories are properly mapped to predefined model categories. Verifies accurate classification, consistent reporting, and standardized data alignment.
Review asset CI field mappings	Evaluates whether asset fields are correctly mapped to configuration item fields using standard mappings. Helps prevent data discrepancies caused by custom or incorrect mappings.
Review asset CI install status mappings	Checks that CI install status values are accurately mapped to the state and substate fields of the corresponding asset record. Verifies precise life cycle tracking and status reporting.
Review asset CI hardware status mappings	Verifies that CI hardware status values align with the state and substate fields of the corresponding asset record. Supports consistent representation of physical asset conditions.
Review Data Manager policies	Assesses the configuration of CMDB Data Manager policies, including archive, attestation, certification, delete, and retire, for the selected hardware CI classes. Each policy type manages a specific life cycle action: **Archive** Archives inactive CIs without deleting them. **Attestation** Validates CI data or runs automated checks. **Certification** Verifies CI data for accuracy and readiness. **Delete**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

CMDB integration settings (continued)

Setting	Description
	Removes CIs based on defined criteria such as inactivity. **Retire** Marks CIs as retired when no longer in use.

Related topics

Administer CMDB Data Manager

Indicators used in the CMDB success advisor for HAM dashboard

Indicators enable viewing of high-level metrics that highlight data quality, completeness, and synchronization issues across hardware assets and configuration items (CIs).

CMDB success advisor for HAM dashboard indicators

Assets created for virtual CIs

Total number of virtual CI assets in the Hardware [alm_hardware] table created daily, where the life cycle stage of CI is operational, the asset field is not empty, and the CI is marked as virtual.

Assets missing CI

Total number of hardware assets in the Hardware [alm_hardware] table missing a linked CI from the Hardware [cmdb_ci_hardware] class, measured daily, where the CI is operational, the asset is actively in use, and no CI is linked to the asset.

CIs by normalization status

Total number of CI records from the Hardware [cmdb_ci_hardware] class, measured daily and grouped by model category and HAM normalization status, based on the Normalized status field on the associated hardware product model.

CI install status vs. asset state matched

All CI records from the Hardware [cmdb_ci_hardware] class where the installation status correctly aligns with the expected asset state, promoting accurate and reliable asset management.

CI install status vs. asset state mismatched

All CI records from the Hardware [cmdb_ci_hardware] class with an installation status that doesn't align with the expected asset state, resulting in erroneous asset management.

CI lifecycle stage vs. asset lifecycle stage matched

All CI records from the Hardware [cmdb_ci_hardware] class with a life cycle stage matched between the CI and its linked asset. This indicator is supported only on instances where the CSDM Activation plugin (com.snc.cmdb.csdm.activation) is installed and migrated to life cycle stage.

CI lifecycle stage vs. asset lifecycle stage mismatched

All CI records from the Hardware [cmdb_ci_hardware] class with a life cycle stage mismatch between the CI and its linked asset. This indicator is supported only on instances where the CSDM Activation plugin (com.snc.cmdb.csdm.activation) is installed and migrated to life cycle stage.

CIs missing asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing a linked asset, measured daily, where the life cycle stage of CI is operational and no asset is associated with the CI.

CIs missing assigned to

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing an assigned owner, measured daily, where the CI lacks an assigned owner.

CIs missing location

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing a location, measured daily, where the CI doesn't have a location assigned.

CIs missing managed by group

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing a managed by group, measured daily, where the CI doesn't have a managed by group assigned.

CIs missing manufacturer

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing a manufacturer, measured daily, where the CI doesn't have a manufacturer specified.

CIs missing model ID

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing a model ID, measured daily, where the CI doesn't have a model ID or model display name specified.

CIs missing model name

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing a model name, measured daily, where the CI doesn't have a model name specified, with or without a model ID.

CIs missing model number

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing a model number, measured daily, where the CI is not associated with a model ID, or is associated with a model ID that is missing a model number.

CIs missing serial number

Total number of CI records from the Hardware [cmdb_ci_hardware] class missing a serial number, measured daily, where the CI doesn't have a serial number assigned.

CIs not updated in last 7 days

Total number of CI records from the Hardware [cmdb_ci_hardware] class not updated in the last seven days, measured daily, where the update timestamp is older than seven days.

CIs not updated in last 14 days

Total number of CI records from the Hardware [cmdb_ci_hardware] class not updated in the last 14 days, measured daily, where the update timestamp is older than 14 days.

CIs not updated in last 30 days

Total number of CI records from the Hardware [cmdb_ci_hardware] class not updated in the last 30 days, measured daily, where the update timestamp is older than 30 days.

CIs not updated in last 60 days

Total number of CI records from the Hardware [cmdb_ci_hardware] class not updated in the last 60 days, measured daily, where the update timestamp is older than 60 days.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

CIs not updated in last 90 days

Total number of CI records from the Hardware [cmdb_ci_hardware] class not updated in the last 90 days, measured daily, where the update timestamp is older than 90 days.

Duplicate CIs

Total number of CI records from the Hardware [cmdb_ci_hardware] class identified as duplicates, measured daily, based on the results of the HAM duplicate CI audit process.

Hardware CIs group by

Total number of CI records from the Hardware [cmdb_ci_hardware] class, measured daily and grouped by model category and discovery source.

Hardware Asset Management reference

Reference topics provide additional information about the lists and forms that you use to configure and administer Hardware Asset Management.

Domain separation and Hardware Asset Management

Domain separation is supported in Hardware Asset Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Enhanced

- Includes all aspects of **Basic** and **Standard** levels of support.
- Data-driven process enables service provider customers to modify business logic that is based on defined use cases. These configurations are UI-based and fail-safe so that configurations by one customer cannot affect another.
- Tenants of the instance must be able to configure minimum viable product (MVP) business logic and data parameters for themselves. This logic and parameters would be expected for the application's normal function.

Sample use case: Tenant-customers of a shared environment must be able to modify the impact, urgency, or priority matrix to set priority within their domain.

For more information on support levels, see Application support for domain separation.

Domain separation overview

Domain separation support in the product enables service providers to offer managed services for software and hardware asset management to their customers. This feature also caters to large organizations who manage their subsidiaries as independent domains.

How domain separation works in Hardware Asset Management

In HAM, domain separation occurs in two stages: data separation and process separation. There are no system properties specific to Hardware Asset Management that can be used to enable or disable the separation. However, the Domain Asset Process Settings table (alm_domain_asset_process_setting) stores configurations for asset processes, including the normalization of hardware models. By default, normalization is performed only for models within the TOP/Default domain. However, if you have the asset or domain_admin role, you can enable normalization for hardware models in any domain. To enable normalization for a specific domain, follow these steps:

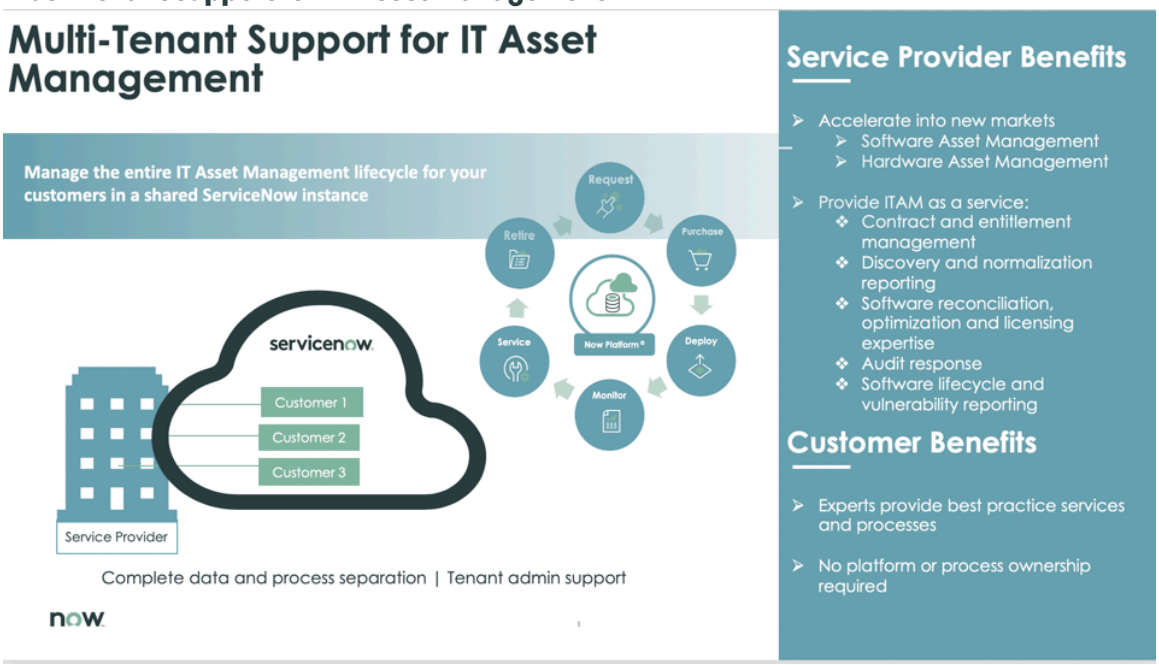
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Navigate to the Domain Asset Process Settings table (alm_domain_asset_process_setting).
2. Locate the specific domain for which you want to enable normalization of models.
3. Set the **Run asset process** field to **true**.

Note:

The Recommended practice is to avoid customizing the base system domain configuration record.

Mutli-Tenant support for IT Asset Management



Required plugins

- Service Catalog – Domain Separation (com.glideapp.servicecatalog.domain_separation)
- Domain separation extension (com.glide.domain.msp_extensions.installer)
- Performance Analytics – Domain Support (com.snc.pa.domain_support)
- HAMP (store app)

To learn more, see Domain separation explained, Contains queries and domain access, and Importance of Default domain.

Related topics

Domain separation for service providers

Quick start tests for Hardware Asset Management

Validate that Hardware Asset Management (HAM) still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Hardware Asset Management quick start tests are available when you install the Hardware Asset Management (HAM) application from the ServiceNow Store.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware Asset Management test suite

Test	Description	Release version
HAM - Hardware Normalization	Validates the various normalization status values based on the normalized Manufacturer, Product, and Model.	Orlando
HAM - Hardware Asset Disposal work flow	Validates asset disposal work flow.	Paris
HAM - Automating Asset deploy workflow	Validates asset deployment work flow.	Paris
HAM - Automating Asset Swap workflow	Validates Asset Exchange/ Swap work flow. **Note:** Requires demo data.	Paris
HAM - Standard Hardware Asset Request Flow	Validates the Standard Hardware Asset Request flow, which is a part of the Hardware Asset Management application.	Paris
HAM - Hardware Asset Refresh flow	Validates asset refresh workflow.	Quebec
HAM - Loaner Asset Allocation Flow	Validates loaner asset workflow.	Quebec
HAM - Lease Contract Asset Expiration	Validates leased contract asset expiration end to end workflow, performing return or extend of the assets covered in the lease contract.	Quebec
HAM - Asset RMA Flow	Validates the asset Return Merchandise Authorisation (RMA) workflow with Inventory User.	Rome
HAM - Asset RMA Flow (SP)	Validates the asset Return Merchandise Authorisation (RMA) workflow from Service Portal.	Rome
HAM - Loaner Asset Request Flow	Validates the Loaner asset allocation workflow with Inventory Admin user.	Rome
HAM - Contract Renewal Flow	Validates the Contract Renewal flow with Contract Manager user.	Tokyo

Related topics

Quick start tests

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware Asset Workspace roles

Details of the out-of-the-box roles that can access Hardware Asset Workspace.

Roles to access Hardware Asset Worksapce

Role	Access details
inventory_admin	Access to create, edit, manage, and delete stockrooms.
procurement_user	Access to procurement tasks such as creating purchase orders and viewing transfer orders.
inventory_user	Access to stock information.
model_manger	Access to create, modify, and delete records of the base Model [cmdb_model] table.
contract_manager	Access to create, edit, and delete contracts through the Contract Management application.
itil	Access to open, update, and close the following items: • Incidents • Problems • Changes • Configuration management items
sam_admin	Access to work on any functionality that the Software Asset Management application offers.
asset	Access to create, edit, manage, and delete the hardware and consumable asset records.
catalog_manager	Access to view and assign catalog editors to their categories. Also create, modify, and publish items within those categories.
ham_admin	This role is available only when theHardware Asset Management (HAM) is installed and provides access to all HAM features.
sam_user	This role is available only when theSoftware Asset Management is installed
catalog_admin	Access to create, edit, and manage the Service Catalog.
sam	Access to Software Asset Management features included with Asset Management. Different roles such as sam_admin, sam_user, and sam_developer are required to use the Software Asset Management application.

Supported asset tasks on Now Mobile app

The ServiceNow Now Mobile app supports a limited set of Hardware Asset Management task types in the **My Group tasks** view.

Stockroom types

Stockroom types are categories of stockrooms.

The stockroom type has two significant characteristics.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Priority**: Order of stockrooms the parts should be sourced from. For example, if a personal stockroom (priority 2) contains the required part, the personal stockroom receives priority over the Central Stockroom (priority 7) because the part in the personal stockroom doesn't require delivery.
- **Shipment Required**: Informs the system if a transfer order must be created when the part is sourced from a stockroom of the given type. For example, a part in a personal stockroom doesn't require shipment, so no transfer order is needed.

Stockroom types defined in the base system

Value	Name	Priority	Shipment Required	Description	Comment
on_site	On Site	1	False	Stockroom at the customer site.	Close to the users and doesn't require shipping.
field_agent	Field Agent	2	False	Virtual, personal stockroom linked with a field service agent (FSA) directly, used for delivery.	Used to indicate to the system that the part has been delivered and is with the FSA.
fsl	FSL	4	True	Forward Shipping Location.	Small stockrooms where the parts can typically be shipped via overnight delivery.
pudo	PUDO	5	True	Pick Up/Drop out location.	This type is sometimes called a by-box. Can be a postal box that can receive new and returned parts that are often near major customer sites.
stockroom	Warehouse	6	True		A regional stockroom.
central_stockroom	Central Warehouse	7	True		A central stockroom, usually a large facility from which most parts are shipped.

Installed with Hardware Asset Management

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

Roles installed

Role title	Description	Contains roles
ham_admin	Grants full access to the respective features of the Hardware Asset Management application including the ability to Opt-in for the Content	• inventory_admin • catalog_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role title	Description	Contains roles
	Service. This role is used for Hardware Asset Management.	• report_user • sn_hamp.ham_user • asset • procurement_admin
sn_hamp.ham_user	Manage hardware assets and reports. This role enables users to view, create, update, and delete hardware asset records, and to generate and view asset-related reports. This role is tailored for everyday asset management tasks.	asset

Granular roles

Granular admin roles for Hardware Asset Management

HAM functionality	Granular admin role	Description
HAM licensing	sn_hamp.ham_system_admin	Provides access to: • Edit Exclusion flag [excluded_from_ham] value over asset • **HAM Resource Categories** menu
Advanced Shipment Notification (ASN)	sn_hamp.ham_asn_admin	Provides access to: • **Import shipment notification** and **Import status** UI options • Read access to the **Import template** page
Zero touch request	asset_integration_admin	Provides access to: • Create provider integration profile records in the Provider integr [sn_hamp_provider_int_profile] table • **Provider integration profiles** list in the Asset operations view o Asset Workspace
HAM Guided Setup	sn_hamp.ham_system_admin	Provides access to: • **HAM Guided Setup** module • **Getting started** page of Hardware Asset Management Guided S
HAM application properties	sn_hamp.ham_system_admin	Access to the following application properties: • *sn_hamp.enable_asset_action_validation_inci* • *sn_hamp.enable_asset_action_validation_chan* • *sn_hamp.enable_asset_tag_serial_number_edit*
HAM system properties	sn_hamp.ham_system_admin	Access to the following system properties:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Granular admin roles for Hardware Asset Management (continued)

HAM functionality	Granular admin role	Description
		• *sn_hamp.update_assets_norm_model_name* • *sn_hamp.enable_asset_action_validation_chan* • *sn_hamp.enable_asset_tag_serial_number_edit* • *sn_hamp.enable_shipping_carrier_validation_* • *glide.ui.sn_hamp_loaner_asset_order_activit* • *sn_hamp.enable_custom_category_licensing* • *sn_hamp.model_lifecycle_phase_order* • *sn_hamp.sn_ham_active_entitlements* • *glide.sg.voice_search.enabled* • *glide.ui.sn_hamp_asset_reclaim_task_activit* • *glide.ui.sn_hamp_ztr_task_activity.fields* • *sn_itam_common.close_attestation_async* • *sn_itam_common.sn_enable_indoormap_for_asse* • *com.sn_itam.enable_flow_designer.transfer_o* • *sn_itam_common.asset_tco_benchmark_threshol* • *sn_itam_common.put_away_task.drop_off_locat* • *com.sn_itam.enable_flow_designer.transfer_o*
Important Actions in the Inventory view of the Hardware Asset Workspace	Admin role isn't required. The asset, inventory_admin, or ham_admin role is sufficient.	You can view the following important action cards in the Inventory admin role: • **Inventory - Stale shipments** • **Inventory - Carrier integration failures** • **Inventory - Unmapped carrier profiles**
Asset operations list in the Hardware Asset Workspace	sn_hamp.ham_system_admin	Provides access to the following lists in the Assets operations vie • **Asset warranty** • **Carrier integration profiles**
Loaner asset order	sn_hamp.ham_system_admin	Provides access to delete records in the Loaner Asset Order [sn_hamp_loaner_asset_order] table.
Shipment	asset_integration_admin	Provides write access to the Ignore stale check [ignore_stale_che Shipment [sn_itam_common_shipment] table.
Carrier integration	asset_integration_admin	Provides access to the Carrier Integration Profile [sn_itam_carrier_ to perform the following tasks:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Granular admin roles for Hardware Asset Management (continued)

HAM functionality	Granular admin role	Description
		• Create carrier integration profiles • View reports
Import assets	sn_hamp.ham_system_admin	Provides access to the *sn_itam_common.receive_assets* system property and application property.
Attestation	Admin role isn't required. The asset or inventory_admin is sufficient.	Provides access to the following UI actions: • **Cancel attestation** • **Cancel schedule**
Contract renewal	contract_system_admin	Provides Write access to the *sn_itam_common.sn_contract_enable_renewal_fl* property.
ITAM AI agents	asset_aia_admin	Provides access to read, write, delete, and report on the ITAM AI A [itam_aia_log] table.
Common Hardware Asset Management and Enterprise Asset Management tables	sn_hamp.ham_system_admin	Provides access to the following tables: • RFID Connection Attributes [sn_itam_common_rfid_conn_attr] • RFID Stage Asset [sn_itam_common_rfid_stg_asset] • Repair order [sn_itam_common_repair_order] • Repair order line [sn_itam_common_repair_orderline] • Asset order [sn_itam_common_asset_order] • Asset order line [sn_itam_common_asset_orderline] • Loaner Asset Order [sn_itam_common_loaner_asset_order]

Scheduled jobs installed

Scheduled job	Description
HAM - Content Upload	Publishes the normalized hardware models.
HAM - Daily Job	Calculates number of hardware and consumable models for each model category, active life cycle phase for models, and sets client schedule pull-time.
HAM - Hardware Lifecycles	Generates hardware life cycles.
HAM - Hardware Normalization	Normalizes hardware and consumables models.
HAM - Loaner Asset Order Allocations	Allocates assets to Loaner Asset Orders.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scheduled job	Description
HAM - Populate Licensing Data	Populates licensing details.
HAMP - Content File Manager	Job is triggered from the Manage Hardware Library.
Purge Asset Audits More Than Year Old or with More Than 10k Assets	Removes old asset audit records or asset audits with more that 10K assets.
[PA HAM] Daily collection job	Daily job that collects scores for different parameters.

Tables installed

Table	Description
Bundle [alm_bundle]	Details of bundle assets.
Asset Audits [sn_hamp_asset_audit]	Details of the asset audits.
Hardware Asset Reclamation Line [sn_hamp_asset_reclaim_line]	Details of the Hardware Asset Reclamation Lines created for each reclaimed asset.
Hardware Asset Reclamation Task [sn_hamp_asset_reclaim_task]	Details of the tasks created for each Hardware Asset Reclamation Line.
Asset RMA Task [sn_hamp_asset_rma_task]	List of RMA asset task records.
Hardware Asset Configuration [sn_hamp_configuration]	Configuration records of Hardware Asset Management.
HAM Content Audit [sn_hamp_content_audit]	Details of content values that changed.
Contract Renewal Request [sn_contract_renewal_request]	Stores all the contract renewal requests through the contract renewal workflow.
Contract Renewal Request Line [sn_contract_renewal_request_line]	Stores all the contract renewal request lines through the contract renewal workflow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Contract Renewal Task [sn_contract_renewal_task]	Stores all the contract renewal request tasks through the contract renewal workflow.
Custom Device Type [sn_hamp_custom_hw_device_type]	List of custom hardware device type records.
Custom Hardware Manufacturer [sn_hamp_custom_hw_manufacturer]	List of custom hardware device manufacturer records.
Custom Hardware Product [sn_hamp_custom_hw_product]	List of custom hardware product records.
Custom Hardware Model Library [sn_hamp_custom_hw_prod_model]	List of custom hardware model library records.
Hardware Disposal Order [sn_hamp_hardware_disposal]	List of Hardware Disposal Order records.
Hardware Disposal Tasks [sn_hamp_hw_asset_disposal_task]	Details of the tasks associated with the Hardware Disposal Order flow.
Device Type [sn_hamp_hw_device_type]	List of hardware device type records. **Important:** You mustn't modify the records of this table.
Hardware Manufacturer [sn_hamp_hw_manufacturer]	List of hardware device manufacturer records.
Hardware Normalization Map [sn_hamp_hw_normalization_map]	Product details such as hardware product and hardware product model IDs.
Hardware Product [sn_hamp_hw_product]	Product details such as name of the product and type of device.
Hardware Model Library [sn_hamp_hw_product_model]	Product details such as product and model number.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Hardware Asset Refresh Line [sn_hamp_hw_refresh_line]	Hardware Asset Refresh Line details such as stage, requested item, replacement model, and replacement asset.
Refresh Line Tasks [sn_hamp_hw_refresh_line_task]	Details of Refresh Line tasks associated with the Hardware Asset Refresh Lines.
Import Staging [sn_hamp_import_template]	Template for importing assets and model records.
Hardware Lifecycle Definition [sn_hamp_lifecycle_definition]	Life cycle phase of a hardware or consumable model and the associated dates.
Loaner Asset Order [sn_hamp_loaner_asset_order]	List of Loaner Asset Order records.
Loaner Asset Task [sn_hamp_loaner_asset_task]	List of Loaner Asset Order task records.
Audits to Scanned Assets [sn_hamp_m2m_audit_asset]	List of audit records of scanned assets.
Planned Assets [sn_hamp_m2m_hw_asset_disposal]	Details of the assets included in Hardware Asset Disposal Orders.
Replacement Models [sn_hamp_m2m_ztr_replacement_model]	List of replacement records for Zero Touch Refresh models.
Manage Hardware Library [sn_hamp_manage_hw_library]	List of Hardware Library content import records.
Model Category Normalization Summary [sn_hamp_model_ctg_norm_summary]	Summary of normalization of model category.
HAM Resource Category [sn_hamp_resource_category]	Subscription unit ratio and other licensing-related details of each Resource category.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
RMA Request [sn_hamp_rma_request]	List of RMA request records.
RMA Request Line [sn_hamp_rma_request_line]	List of RMA request line records of RAM requests.
HAM Success Activity [sn_hamp_success_activity]	List of HAM Success Activity records.
HAM Success Goal [sn_hamp_success_goal]	List of HAM Success Goal records.
Zero Touch Refresh Model [sn_hamp_ztr_refresh_model]	Details of refresh model records for the Zero Touch Refresh flow.
Zero Touch Refresh Request [sn_hamp_ztr_request]	List of Zero Touch Refresh request records.
Zero Touch Refresh Task [sn_hamp_ztr_task]	Details of tasks associated with the Zero Touch Refresh flow.
RFID asset [rfid_asset]	Stores the RFID information of assets.

Asset record fields

Fields on the Hardware Asset Details form help you create hardware, software, consumable, bundle, pallet, mobile, and facility assets.

Field	Description
Display name	Name of the asset as it appears in the record lists. This field is automatically set when you create an asset, based on the **Asset Tag** and **Model** fields.
Model category	Model grouping of the asset. Based on the model category you select, the asset is linked to a configuration item.
Model	Specific product model of the asset.
Configuration Item	CI is automatically created when you create an asset. Point to the reference icon to view the configuration item details inherited from the asset record. The CI value is populated as follows:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• By default, the CI value is based on the **Model** field. • If the model category of the asset is associated with a CI and the Serial number field isn't empty, then the CI value is based on the **Serial number** and **Model** field values. • If an asset is created in the On Order state, then the CI value is based on the **Model** field.
Quantity	The number of items this asset represents. An asset has a quantity of one unless one or more of these points are true. • If the asset is a consumable, the quantity is unrestricted because consumables are tracked in groups. • If the asset is pre-allocated, the quantity is unrestricted when the **Model category** and **Model** values are defined and **Substate** is set to **Pre-allocated**. **Note:** When the **Quantity** field value is greater than one, the asset is managed as a group and do not require individual asset tags and serial numbers. This applies to pre-allocated assets and consumables where individual tracking is not required.
General All the fields aren't available for each type of asset.	
Asset tag	Alphanumeric information assigned by your organization to help track the asset. **Note:** When the **Quantity** field value is greater than one, the asset is managed as a group and the **Asset tag** field value isn't populated.
State	Current state of the asset, such as **On order** or **In use**.
Assigned to	The person using or primarily responsible for this item. This field appears when the **State** is **In Use**. **Note:** When the **State** field value is updated from **In Use** to **On Order**, **In Stock**, or **In Transit**, this field value is automatically cleared. For more information about the business rules for updating the **Assigned to** field, see the https://support.servicenow.com/nav_to.do?uri=%2Fkb%3Fid%3Dkb_article_view%26sysparm_article%3DKB0719392 article in the Now Support Knowledge Base.
Stockroom	Name of the stockroom. This field appears only when the state of the asset is **In stock** or **Build**.
Aisle and space	Aisle and space details of the asset within the stockroom. This field appears only when the state of the asset is **In stock** or **Build**. **Note:** This field would appear only when the Hardware Asset Management Professional plugin (com.sn_hamp) is installed.
Managed by	The person who maintains the asset. This field value can be different from the person in the **Owned by** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Owned by	The person who has financial ownership of the asset. This field value can be different from the person in the **Managed by** field.
Parent	Parent asset of the asset. For example, a monitor or peripheral can have a workstation as their parent asset. When a parent link is defined, the fields related to the assignment and state of the child assets is set to read-only and are populated based on the parent assignment and state fields. For more information, see Bundled models.
Asset function	Function of the asset. The available values are as follows: • Primary • Secondary • Shared • Loaner • Asset Bundle
Class	Asset group, for example, base, hardware, license, or consumable.
Comments	Information about the asset that would be helpful for others to know.
Serial number	Serial number of this asset. **Note:** When the **Quantity** field value is greater than one, the asset is managed as a group and the **Serial number** field value isn't populated.
Substate	Current substate of the asset. The available substate settings depend on the state selected. For example, the **Retired** state contains the **Substate** options **Disposed**, **Sold**, **Donated**, and **Vendor credit**.
Location	Current physical location of the asset. **Note:** You can set the location to a place, floor, building, or campus. When you set the location to any of the options except the campus, the Location hierarchy section is shown on the asset form. The location hierarchy shows the hierarchical relationship between the specified location and its parent locations. If you meet the following criteria, the asset form displays an interactive map that shows the real-time location of the asset: • The location is set to a specific place. • Access indoor maps through the Indoor Mapping for Assets (com.sn_ima) application. This application gets installed on your ServiceNow instance along with Hardware Asset Management. You can also install this application explicitly from the ServiceNow Store. • The *sn_itam_common.sn_enable_indoormap_for_assets* system parameter is set to **true** on your ServiceNow instance. The Location map doesn't appear by default. To view the map, select the Location map ( ) icon on the contextual sidebar of the asset record. Location map doesn't appear for excluded assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Department	Department to which the asset belongs.
Company	Company or organization to which this asset belongs.
Assigned	The date on which the asset was assigned to a user.
Installed	The date on which the asset was installed.
Location Hierarchy The Location Hierarchy section is available only for hardware, consumables,bundles, and pallet assets. This section appears only under the following conditions: • When the *sn_itam_common.sn_enable_indoormap_for_assets* system parameter is set to **true** on your ServiceNow instance • When you select any location except the campus	
Floor	Floor where the place specified in the Location field is located. **Note:** This field appears only when you select a place in the Location field and is populated automatically based on the location.
Building/ Structure	Building to which the floor belongs. **Note:** This field appears only when you select a place or floor in the Location field and is populated automatically based on the location.
Campus	Campus where the building is located. **Note:** This field appears only when you select a place, floor, or building in the Location field and is populated automatically based on the location.
Financial The Financial section is available only for hardware, software entitlement, and facility assets.	
Request line	Requested item to which the asset is linked.
Invoice number	Invoice under which the asset was billed.
Cost	The price at which the asset was purchased.
Vendor	Vendor from which the asset was purchased. The assets that are automatically created from purchase orders in Procurement, the default value of the **Vendor** field is the vendor specified on the purchase order.
Opened	The date on which the requested item record was opened. The system automatically populates the field when a request line is specified.
GL account	General ledger account number with which the asset is associated.
Cost center	Group financially responsible for the asset.
Acquisition method	The way of acquiring the asset. Base system choices are **Purchase**, **Lease**, **Rental**, **Bring Your Own Asset** and **Loan**. The assets that are automatically created from purchase orders in Procurement, the default value is **Purchase**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Expenditure type	The type of expenditure. • **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. • **Opex**: Operational expenditure is an on-going expenditure. For example, toners for the photocopier.
Eligible for refresh	
Asset TCO	The total cost of ownership of the asset, where the total cost includes initial capital cost and operation cost. For more information about Asset TCO, see Asset Total Cost of Ownership for Hardware Asset Management. **Note:** Amount displayed in the system currency.
TCO benchmark cost	Predefined benchmark cost of the asset model. **Note:** This field is referenced from the Hardware model details form. For more information, see Hardware model details.
TCO benchmark threshold	The threshold value of your asset model cost identifying that the asset is reaching the TCO benchmark cost value. The benchmark threshold is set to 75% of the TCO benchmark cost by default. For example, if you set the TCO benchmark cost of an asset model as $1000, the TCO benchmark threshold is set to $750 automatically. Use the system property *sn_itam_common.asset_tco_benchmark_threshold_percentage* to update the benchmark threshold value. This field is referenced from the Hardware model details form. For more information, see Hardware model details.
TCO benchmark status	Status of the asset TCO. • Reached: If the **Asset TCO** value is equal to or more than the **TCO benchmark cost** value, the TCO benchmark status shows as **Reached**. • Approaching: If the **Asset TCO** value is less than the **TCO benchmark cost** and more than the **TCO benchmark threshold** value, the TCO benchmark status shows as **Approaching**. • Not reached: If the **Asset TCO** value is less than the **TCO benchmark threshold** value, the TCO benchmark status shows as **Approaching**.
Disposal	
Disposal order number	A unique number assigned to the asset disposal order. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal vendor	The vendor assigned to carry out the asset disposal order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Vendor disposal order ID	The order number assigned by the vendor to carry out the asset disposal order. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal date	The date when the asset disposal order process is completed. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal reason	Text explaining why the asset is being retired.
Beneficiary	Organization that receives the asset when it's retired.
Resale price	Value of the asset when it's retired. For example, if the asset is donated, the value is used when reporting taxes.
Scheduled retirement	Scheduled date on which the asset is retired.
Retired date	Actual date on which the asset was retired.
Depreciation The Depreciation section is available only for hardware and facility assets.	
Depreciation	Depreciation method that is applied. Base system choices are **Declining Balance** and **Straight Line**. The depreciation value is defaulted from the associated Model.
Depreciation effective date	The date on which the specified depreciation method begins.
Salvage value	Estimated value of an asset at the end of its useful life. This value must be less than or equal to the Cost of the asset.
Residual date	Date on which the residual value was calculated.
Residual value	Residual value of the asset.
Depreciated amount	Amount the asset has depreciated.
Contracts The Contract section is available only for hardware, software entitlement, or facility assets.	
Lease contract	Name of the lease contract that applies to the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Warranty expiration	Expiration date of the asset warranty.
Lease expiration date	The date on which the contract gets expired. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Lease term (months)	The period in months the lease contract is active for. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Monthly lease payment	Amount that you pay monthly for the contract. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Support group	The group managing the contract covering the asset.
Like-kind exchange	A similar asset that you want to return to the contract vendor instead of the asset that you brought in lease. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Supported by	The person managing the contract covering the asset.
Activities	
Work notes	Work notes are updated for the following cases: • Updates to **Assigned To**, **Managed To State**, **Substate**, and **Reserved** fields of asset. The columns for these fields are audited by default and any updates is recorded in the work notes. • Work notes for hardware and software assets are updated when the asset is received by a purchase order and transfer order. These work notes help in tracking the life cycle of the asset.
Audit	
Audit number	Audit number of the asset.
Audit type	Type of audit that was carried out on the asset.
Last audit date	The date on which the last audit was done.
Last audit state	State of the last audit.
Audited by	The person who performed the last audit.
Attestation	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Attestation number	Unique identifier of the asset attestation request.
Attested by	Employee who confirmed the asset.
Last attestation date	Date on which the asset was last attested.
Last attestation state	Last attestation status of the asset. This field can have any of the following values: • **Yes**- Employee confirmed the ownership of the asset. • **No**- Employee denied the ownership of the asset • **Canceled**- The asset attestation is canceled before the employee confirmed the asset. • **Closed incomplete**- When an attestation is created for the asset which already has an attestation yet to be confirmed by the employee, the existing attestation is closed incomplete.
Mobile The Mobile section is available only for the Mobile Device model category. **Note:** This section of the form and the relevant data model appear only when Hardware Asset Management (sn_hamp) is installed.	
Carrier	Name of the carrier company.
Ownership	Ownership of the asset. The available values are: • Employee • Corporate
IMEI	Unique number for tracking the mobile device.
Pre-enrollment ID	The user who conducted the last audit.
MAC Address	MAC address of the mobile device. **Important:** From the Hardware Asset Management 12.0.0 release onward, the value in this field is populated based on the MAC address [mac_addr] field in the Asset [alm_asset] table instead of the MAC address [mac_address] field in the Hardware [alm_hardware] table. Also, the MAC address [mac_address] field in the Hardware [alm_hardware] table is deprecated in the Hardware Asset Management 12.0.0 release. However, the [mac_address] field remains functional. Hardware Asset Management keeps it synchronized with [mac_addr] in both directions, so existing data and integrations continue to work. The MAC address [mac_addr] field in the Asset [alm_asset] table is available only when the Hardware Asset Management (sn_hamp) store app is installed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Enrollment ID	User conducting the current audit.
Phone number	The phone number associated with the mobile device.
Enrollment name	Name of the mobile device enrollment.
Platform	Platform of the mobile device. The available options are: • Android • iOS • Windows • ChromeOS • Other
Enrollment state	Current enrollment state of the device. The available options are: • Enrolled • Unenrolled • Expired • Pending enrollment • Pending unenrollment
Purchased	The date on which the mobile device was purchased.
Enrollment date	Initial enrollment date.
Upgrade eligible date	The date on which the mobile device is eligible for an upgrade.
Last enrolled	Date of last enrollment.
Service contract	Contract number associated with the mobile device.
Device activated	Activation status of the mobile device. The available options are: • Yes- The mobile device is activated. • No- The mobile device isn't activated.
DaaS **Note:** This section appears only when Hardware Asset Management for DaaS application (com.sn_daas_ham) is installed.	
DaaS asset	Option for selecting the asset as a DaaS asset.
DaaS account	The account to which the DaaS asset is associated to.
Related links	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Calculate Depreciation	Select to calculate the depreciation amount and residual value.
Delete Assets Only	Select to delete the assets and not the associated CI.
Related lists	
Assets	Assets that 's related to the asset you created.
Expense lines	Expense line associated with the asset.
RMA	Return Merchandise Authorization associated with the asset.

Consumable model fields

Consumable Models form and related list field descriptions.

Consumables section

Field	Description
Display name	Name of the model that is dependant on name of the asset and the manufacturer.
Model category	Model category of the asset. The type of category depends if the asset is linked to a CI.
State	Current state of the asset.
Substate	Current substate of the asset.
Stockroom	Name of the stockroom where the asset is located if the asset is in stock.
Quantity	Number of assets.

Vendor Catalog Item related list

Field	Description
Name	Display name of the vendor catalog item.
Vendor	Name of the product vendor.
Product Model	Product model associated with the vendor catalog item.
Out of Stock	Option that indicates if the product is out of stock.
Application	Application that contains the product record.
Product ID	Manufacturer product ID.
List Price	List price of the product before any discounts are applied.
Vendor Price	Vendor price of the product.
Rank tier	Vendor rank tier.
Short Description	Description of the product.
General	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Product Catalog Item	Product catalog item that was created when the item was published.
UPC	Universal Product Code (UPC) of the product.
Description	Description of the product.
Picture	Picture of the product.
Active	Option that indicates if the product is active or not.
Information	
Specifications	Product specifications that come from the vendor.
Features	Product features that come from the vendor.

Consumable Model Lifecycles related list

Field	Description
Model	Name of the model.
Lifecycle type	Type of lifecycle. • **Internal** • **Publisher**
Lifecycle phase	Phase of the lifecycle. • **General Availability** • **End of Sale** • **End of Support** • **End of Extended support** • **End of Life**
Source	Source of the lifecyle of the model.
Description	Description of the lifecycle.
Phase start date	Date the lifecycle phase starts.
Phase end date	Date the lifecycle phase ends.
Risk	Risk associated with the lifecycle.
Active	Option that indicates the lifecycle of the model is active.

Related topics

Create a hardware or consumable model

Asset audit fields

Create New Asset Audits form and related fields description.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Asset Audits form

Field	Description
Audit number	Audit reference number.
Assignment group	Assignment group to which you want to assign the inventory audit record.
Type	Type of the asset audit. The available values are: • Location • Stockroom
Assigned to	Person responsible for the audit.
Location **Note:** This field appears only if you set the **Type** field to **Location**.	Location in which you want to perform the audit.
Include child locations **Note:** This field appears if you set the **Type** field to **Location**.	Option to include child locations in the audit.
Stockroom **Note:** This field appears only if you set the **Type** field to **Stockroom**.	Stockroom in which you want to perform the audit.
Status	Present status of the audit.
Model category	Model category for which you want to perform the audit.
Scan date	Date when you want to scan the assets.
Aisle and space **Note:** This field appears only if you set the **Type** field to **Stockroom**.	Aisle and space for which you want to perform the audit.
Include consumables	Option to include consumable assets in the stockroom audit. The available options are: • Yes: When this field is set to **Yes**, consumable assets are included in the inventory audit. • No: When this field is set to **No**, consumable assets aren't included in the inventory audit.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: You can include consumable assets only for stockroom audit. When the **Type** field is set to **Stockroom**, this field is activated. When the **Type** field is set to **Location**, this field is automatically set to **No** and inactive. The default populated value for this field is derived using the *sn_itam_common.set_default_include_consumab* system property. • When this system property value is set to **yes**, the default value for the **Include consumables** field is set to **Yes**. • When this system property value is set to **no**, the default value for the **Include consumables** field is set to **No**.
Scheduled date	Scheduled date when you want to perform the audit.
Scan method	Type of scan method for scanning the assets. The available options are: • Single scan • Multi scan Depending on the value of the **Include consumables** field, the default selection for the scan method is automatically determined. • When the **Include consumables** field is set to **Yes**, the **Scan method** field value is automatically set to **Single Scan** and can't be edited. • When the **Include consumables** field is set to **No**, the Scan method field becomes editable, enabling you to select the desired scan type. Depending on the selected scan method for the audit record, you can scan the assets in the inventory using the ServiceNow Agent app. • To complete asset scanning for the single scan audit record, see Complete a single scan inventory audit using the ServiceNow Agent app. • To complete asset scanning for multi scan audit records, see Complete multi scan inventory audit using the ServiceNow Agent app.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The audit result fields such as **Expected**, **Not expected and location corrected**, **Missing**, **New**, and **Excluded from licensing** can't be edited. When the asset is scanned in the inventory using the ServiceNow Agent app, values are automatically updated in these fields. For more information about scanning assets, see Complete a single scan inventory audit using the ServiceNow Agent app and Complete multi scan inventory audit using the ServiceNow Agent app.

Related topics

- Audit results
- Create an audit record in the Hardware Asset Management application
- Complete a single scan inventory audit using the ServiceNow Agent app
- Complete multi scan inventory audit using the ServiceNow Agent app

Audit results

The Audit results shows the status of the assets when the scheduled or blind audits of asset stockrooms and other locations is complete.

The audit results are generated by comparing the assets scanned at the physical location or stockroom and the asset records present in the ServiceNow instance.

Important: If the *sn_hamp.migrate_hamaudit* system property is set to **false** and you haven't enabled audit enhancements in your ServiceNow instance, the audit results are populated from the Asset Audits [sn_hamp_asset_audit] table.

Audit Results

Field	Description
Scanned and expected	Number of assets scanned in the audit that are expected to be present at the location or stockroom.
Scanned and not expected	Number of assets scanned in the audit that are not expected to be present at the location or stockroom. These asset records are present in the ServiceNow instance.
Expected and not found	Number of assets that are expected to be present at the location or stockroom but not scanned as part of the audit.
New	Number of asset records that were missing from the ServiceNow instance when the assets were scanned. In such cases, a new asset record is created with the model category set as **Unknown model category** and the model set as **Unknown model**.
Excluded from HAM	Number of assets scanned as part of the audit process that are excluded from Hardware Asset Management features. For these assets, audit fields aren't updated.

The following related lists show asset information:

- Expected Assets: Shows a list of all assets that are part of the stockroom or location that is being audited. This list gets populated when you scan an asset for the first time in the audit.
- Scanned Assets: Shows a list of all assets that are scanned during the audit. The list is updated each time scans are submitted from the ServiceNow Agent app.
- Excluded Assets: Shows a list of all assets scanned as part of the audit which are excluded from Hardware Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: If you have set the *sn_hamp.smigrate_hamaudit* system property value to **true** to enable audit enhancements in your ServiceNow instance, the audit results are populated from the Asset Audits [sn_itam_common_asset_audit] table.

Asset audit result

Description	Description
Expected	Number of expected assets that were scanned.
Not expected and location corrected	Number of assets that were scanned but weren't expected.
Missing	Number of expected assets that weren't scanned.
New	Number of assets that were scanned but don't have a record in your ServiceNow instance. **Note:** If the audit record's **Scan method** is set to **Multi scan**, a new asset record is created using the provided Asset tag. The new asset record is created with unknown product model and unknown model category value. Additionally, an asset remediation task is also created to notify you that an asset record is created with unknown model category and unknown product model. Open the asset remediation task from the Hardware Asset Workspace and update the **Model category** and **Model** fields value for the asset. For more information, see Close an asset remediation task.
Excluded from licensing	Number of scanned assets that are excluded from licensing. A value is shown in this field when you scan an asset that meets one of the following conditions: • When you scanned an enterprise asset that is considered as an excluded from licensing asset, if your ServiceNow® instance doesn't have an Enterprise Asset Management license. • When you have opted out of any HAM Resource Categories, then any asset you scan that belongs to those Resource Categories is considered as an asset excluded from licensing.
Found but not in audit scope	The number of scanned assets that are not within the scope of the current audit record. For example, if the audit is created to scan assets located in Aisle and Space 001 of the stockroom, but an asset belonging to

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset audit result (continued)

Description	Description
	Aisle and Space 002 in the stockroom is scanned, that asset cannot be categorized as an unexpected asset for the stockroom. Since the asset is still an expected asset for the stockroom, it is categorized as found but not in audit scope asset.

Related topics

View audit results

Asset audit fields

Hardware model details

Find the hardware model details and related list field descriptions.

Details

Field	Description
Display name	Display name of the model. The display name is generated from the **Manufacturer** and **Name** field.
Manufacturer	Name of the model manufacturer.
Short description	Description of the model.
Model categories	Model categories that the model can be associated with. Model categories are used to create configuration items (CIs) and assets.
Asset tracking strategy	Asset tracking for the model.
Useful life (months)	Number of months that the hardware model can be used for.
Asset tracking unit	Unit that is used to measure the asset.
Acquisition method	Method the assets or CIs were procured.
Cost	Cost of the an individual model.
Depreciation	Depreciation scheme of the model.
Salvage value	An estimate of the residual value of the model.
Name	Name of the model.
Model number	The number that identifies the model. This number can be defined internally or by the manufacturer of the model.
Barcode	Bar code that identifies the model.
Owner	The person responsible for the model.
Status	Status of the hardware model, which is being inherited from the product model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	This field is hidden when you've opted in for the Common Service Data Model (CSDM).
Life Cycle Stage	Stage in the overall life cycle of hardware assets and CIs as related to their products. This field appears only when you've opted in for the Common Service Data Model (CSDM).
Life Cycle Stage Status	Status in the overall life cycle of hardware assets and CIs as related to their products. This field appears only when you've opted in for Common Service Data Model (CSDM).
Expenditure type	Type of expenditure.
Certified	Option that indicates if a model is certified for use.
Calculated lifecycle template	Applied template to calculate life cycle dates.
Calculated lifecycle start date	Date to apply the template and derive the final dates for each phase defined in the template.
TCO benchmark cost	Benchmark cost of the asset model. **Note:** Amount displayed in the currency specified on the model record.
TCO benchmark threshold	The threshold value of your asset model cost identifying that the asset is reaching the TCO benchmark cost value. The benchmark threshold is set to 75% of the TCO benchmark cost by default. For example, if you set the TCO benchmark cost of an asset model as $1000, the TCO benchmark threshold is set to $750 automatically. Use the system property *sn_itam_common.asset_tco_benchmark_threshold_percentage* to update the threshold percentage. **Note:** Amount displayed in the currency specified on the model record.
Hazardous materials	Option to indicate if your asset model contains hazardous materials.
Comments	Comments about the model.
Normalization	
Normalized manufacturer	Normalized name of the model manufacturer.
Product	Normalized name of the product.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Model	Normalized name of the model.
Normalization status	Normalization status of the model.
Device type	Type of device.
Exclude from content service	Option indicating whether the normalization information is excluded from the content service.
Dimensions	
Height	Height of the model populated from the content service.
Width	Width of the model populated from the content service.
Depth	Depth of the model populated from the content service.
Electrical Specifications	Electrical specifications of the model (such as voltages and frequencies) populated from the content service.
Weight	Weight of the model populated from the content service.
Environmental Social Governance (ESG)	
Energy star	Energy Star certified status of the model populated from content service.
EPEAT compliant	Electronic Product Environmental Assessment (EPEAT) compliant status of the model populated from the content service.
EPEAT level	EPEAT level (Gold, Silver, or Bronze) of the model populated from the content service.
Additional Details	
Manufacturer warranty	Manufacturer warranty terms of the model populated from content service.
Features	Product overview, specifications, or attributes of the model populated by the content service.
Information	
Power (watts)	Power requirement of the model in watts.
Height (U)	Height of the model in rack units.
Flow Rate (cfm)	Flow rate of the model in cubic feet per minute.
Sound Power (bels)	Sound power of the model in bels.
Weight (lbs)	Weight of the model in lbs.
Expected lifetime CO2e	Consumed Carbon dioxide equivalent (CO_2e) over the life of the model.
Energy use	Energy consumed by this model.
Energy Star	Requirements to be Energy Star certified by the Environmental Protection Agency (EPA).
Product Catalog	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Catalog Item	Name of the catalog item.
Description	Description of the catalog item.

Compatibles

Field	Description
Model	Name of the hardware model.
Model	Name of the hardware model that is compatible with the hardware model record.

Substitutes

Field	Description
Model	Name of the hardware model.
Substitute	Name of the hardware model that can be substituted for the hardware model.
Domain	Domain of the hardware model record.

Assets

For information about the fields on the Assets tab, see Create assets.

Configuration Items

Field	Description
Name	Name of the CI. This name is often the Domain Name System (DNS) or computer host name.
Manufacturer	Name of the manufacturer.
Location	Location of the manufacturer.
Description	Description of the CI.
Class	Type of asset class.

Model Components

Field	Description
Is main component	Option for indicating if this component is the one that other components are attached to.
Component	Model that the child component will be instantiated as when the asset is created.
Model category of component	Model category that the child component will be instantiated as when the asset is created.
Component parameter	Component parameter requirement.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Mandatory** • **Optional**
Main component	Name of the bundle if the model is an abstract model. **Note:** This field is only used if an abstract model has been defined.

Vendor Catalog Items

Field	Description
Name	Name of the vendor catalog item.
Product ID	The item identification number assigned by your organization.
Short Description	A brief description of the item.
Vendor Price	The price at which the item is available in the vendor catalog. If the vendor offers a discount, the vendor price reflects the discounted price.
Rank Tier	Displays the overall ranking for products and services of this vendor, such as Valued Partner or Tactical Supplier. Rank tier expresses the opinion of your organization of the vendor performance. It can be used to decide if the vendor's products should be promoted or discontinued. Users with the vendor_manager role can edit this field.

Hardware Model Lifecycles

Field	Description
Model	Name of the hardware model.
Lifecycle type	Type of life cycle.
Lifecycle phase	Phase of the life cycle for a hardware model. • **General Availability:** The date when the hardware becomes generally available through the manufacturer's sales channels, including its worldwide subsidiaries, affiliates, and country distributors. The hardware is considered current/active and receiving support from the manufacturer. • **End of Sale:**The last date to order the hardware through the manufacturer's sales channels, including its worldwide subsidiaries, affiliates, and country distributors. After end of sale date, the hardware is no longer available for sale.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **End of Support**: The last date upon which the manufacturer provides standard/regular support for the hardware as entitled by active service contracts. After this date, the manufacturer may continue to provide active support for certain issues in a limited capacity, the scope of which may vary across different manufacturers according to their lifecycle and/or support policies. • **End of Extended Support:** Up until this date, the manufacturer extends limited support for the hardware (after standard/regular support expires), for a defined period according to manufacturer policy. • **End of Life:**The date which indicates the hardware is at the end of its useful life (from the manufacturer's point of view). The manufacturer stops marketing, selling, or sustaining the hardware.
Source	Source of the hardware model.
Phase start date	Start date of the life cycle phase.
Phase end date	End date of the life cycle phase.
Risk	Risk associated with the life cycle.
Active	Option that indicates if the hardware model life cycle is active.
Description	Description of the hardware model.

Related topics

Create a hardware or consumable model

Model lifecycle form

Fields on the hardware or consumable model lifecycle form and their descriptions.

Field	Description
Model	Automatically set to the name of the model.
Lifecycle type	Model lifecycle type: • **Internal**: The lifecycle date is specific to the customer, for example, based on an internal policy or a custom contract with the publisher. This field is automatically set to **Internal**. • **Publisher**: The lifecycle date comes from the manufacturer and is not specific to a customer.
Lifecycle phase	Phase of the life cycle for a hardware model. • **General Availability**: The date when the hardware becomes generally available through the manufacturer's sales channels, including its worldwide subsidiaries, affiliates, and country distributors. The hardware is considered current or active and receiving support from the manufacturer. • **End of Sale**: The last date to order the hardware through the manufacturer's sales channels, including its worldwide subsidiaries, affiliates, and country distributors. After the end of sale date, the hardware is no longer available for sale.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **End of Support**: The last date upon which the manufacturer provides standard or regular support for the hardware as entitled by active service contracts. After this date, the manufacturer may continue to provide active support for certain issues in a limited capacity, the scope of which may vary across different manufacturers according to their lifecycle or support policies. • **End of Extended Support**: Up until this date, the manufacturer extends limited support for the hardware (after standard/regular support expires), for a defined period according to manufacturer policy. • **End of Life**: The date which indicates the hardware is at the end of its useful life (from the manufacturer's point of view). The manufacturer stops marketing, selling, or sustaining the hardware.
Source	Source of the hardware model. Automatically set to **Internal** to identify the entry as a custom entry.
Risk	Risk associated with the lifecycle.
Phase start date	Start date of the lifecycle phase.
Phase end date	End date of the lifecycle phase. **Note:** This field is not used by any models in the Hardware Asset Management application.
Lifecycle code	Not available when manually adding a custom lifecycle record. **Note:** The lifecycle code is only available for lifecycle records that come directly from the ServiceNow Content Library and can't be set for the user-created lifecycle records.
Active	When selected, the lifecycle record is active.
Description	Description of the hardware or consumable model.

Related topics

Create an internal lifecycle in the Hardware Asset Workspace

Hardware disposal order stages

A hardware disposal order goes through various stages in the disposal process before it's completed. With each stage, the task that's associated with that stage changes too.

Closing a task in the hardware disposal process completes that task and automatically creates the next task in the process. For example, after you close the Schedule Pickup task, the state for that task changes to Closed Complete and the next task, Asset Departure, is created. This process continues until you close all the tasks required for disposing of the selected assets. After you close all the tasks, the disposal order is completed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware disposal order stages

Hardware disposal stages	Task	Description
Draft	Verify Assets	Hardware disposal record is created.
Scheduling	Schedule Pickup	Scheduling details for the hardware asset disposal order.
Transit	Asset Departure	Verified assets are ready for departure.
Confirmation	Vendor Confirmation	Hardware disposal order is confirmed by the vendor.
Documentation	Disposal Documentation	Documentation for the disposal record is attached.
Completed	None	Hardware disposal record request is completed.
Cancelled	None	Disposal order can be canceled only until the transit stage.

Components installed with Hardware Model Normalization

Several types of components are installed with activation of the Hardware Model Normalization plugin, including tables.

Note: To view all other components that are installed with this application, see the Application Files table. For instructions on how to access this table, see Find components installed with an application.

Tables installed

Table	Description
Device Type	Type of the device, such as computer, printer, or monitor.
Hardware Lifecycle Definition	Lifecycle phase of a hardware or consumable model and the associated dates.
Hardware Manufacturer	Name of the hardware manufacturer.
Hardware Model Library	Name of the product and model number.
Hardware Normalization Map	Hardware product and hardware product model IDs.
Hardware Product	Name of the product and type of device, such as Apple Mac or Lenovo Printer.

HAM Success Goal Details

Fields on the HAM Success Goal Details form help you create success goals for tracking the success of the Hardware Asset Management application in your instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HAM Success Goal Details form

Field	Description
Number	A unique identifier of the success goal.
Status	Status of the success goal. By default, the success goal is in draft status.
Title	The title for the success goal.
Category	The category the success goal belongs to. Choose from the following options: • Automation • Inventory Improvement • Loss Reduction • Normalization • Process Improvement • Vendor/Contract Negotiation
Vendor	Vendor or publisher associated to the success goal.
Goal Type	Defines the metrics of your goal. • Savings • Count
Goal Description	A detailed explanation of the success goal.
Group	The group the goal is to be assigned to.
Owner	The user from the assigned group the goal is assigned to.
Projected Start Date	The projected start date for the success goal.
Projected End Date	The projected end date for the success goal.
Actual Start Date	The actual start date of the success goal.
Actual End Date	The actual end date of the success goal.
Projected Savings	Anticipated savings from the success goal. This field appears only when **Goal Type** is selected as **Savings**.
Actual Savings	The actual savings from the success goal. This field appears only when **Goal Type** is selected as **Savings**.
Projected Count	Anticipated count from the success goal. This field appears only when **Goal Type** is set to **Count**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HAM Success Goal Details form (continued)

Field	Description
Actual Count	The actual count from the success goal. This field appears only when **Goal Type** is is set to **Count**.
Achievement Description	A description of how the success goal was achieved.

HAM Success Activity

Fields on the HAM Success Activity form help you create success activities to track the success of your created goals.

HAM Success Activity form

Field	Description
Number	A unique identifier of the success activity.
Success Goal	The success goal that the activity is being associated to.
State	The current state of the success activity. Choose from the following options: • Open • Pending • Work in progress • Closed Complete • Closed Incomplete • Closed Skipped
Assignment group	The group this activity is assigned to.
Assigned to	A particular person in the assigned group.
Short description	A short description of the success activity.
Description	A detailed description of the success activity.
Work notes	Notes relating to the success activity.

Maturity item details

Fields on the Maturity item details form help you view and update the state and success goal of the maturity item.

Maturity item details

Field	Description
Name	Name of the maturity item.
Type	Type of the maturity item.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Maturity item details (continued)

Field	Description
	• Process • End user
Short description	A brief summary of the maturity item.
Success goal	Success goal associated to the maturity item. For more information about creating a success goal, see Create a success goal for Hardware Asset Management.
State	Current stage of the maturity item. • New • Work in Progress • Closed Complete • Closed Skipped
Maturity level	Current maturity level. • Crawl • Walk • Run
Suggested maturity level	Suggested maturity level for improved value return of your HAM application. • Crawl • Walk • Run
Start date	The start date of the maturity item.
Completed date	Completed date of the maturity item.
Purpose	Description of the purpose and outcome for the maturity item.
Steps to complete	List of steps of how to accomplish the purpose of the maturity item.
Work notes	Notes about the maturity item, which are visible to all users within your organization.

Maturity stages of your Hardware Asset Management program

The maturity of your Hardware Asset Management (HAM) program is divided into three stages such as Crawl, Walk, and Run.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Maturity stages

Stage	Description
Crawl	Begin your HAM journey, such as implementing or developing a new HAM program. At this stage, you can define models, create stockrooms, identify tools to discover data, and establish processes and roles. You can set up a normalization process to normalize models and get the date or time of asset lifecycles.
Walk	Begin establishing processes, procedures, policies, resources, and tools to execute on the roadmap of the Hardware Asset Management program. You can automate the manual processes and procedures, which you've established during the Crawl stage. Move to automating more complex processes by using HAM workflow.
Run	At this stage, you establish and use mature, advanced, and automated processes and procedures for centralized hardware asset tracking and system management. You use advanced capabilities like zero-touch refresh, asset bundles, mobile classes, and contract renewal workflows. You must also be evaluating processes and establishing HAM goals regularly.

Task closures that create shipment records

A shipment record is created automatically when any shipment task is closed. You can track a shipment easily by specifying a tracking number and shipping carrier on the shipment task.

Sources of shipments

Source flow	Task source for shipment record creation	Source for updating the shipment record to Closed or Delivered
Asset Donation	The Select the assets departing for donation task is closed.	The Confirmation from charity organization task is closed.
Asset disposal	The Asset departure task is closed.	The Vendor confirmation task is closed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sources of shipments (continued)

Source flow	Task source for shipment record creation	Source for updating the shipment record to Closed or Delivered
		Note: You can change the tracking number until this task is closed. If you don't specify any tracking number, a shipment record is created with the Vendor order ID as the tracking number.
Purchase order	• Create hardware assets prior to delivery: When the hardware asset records are automatically created. • Advanced shipment notification: When the assets are imported for every unique tracking number specified in the import file. **Note:** If the shipping carrier specified for a row in the import file isn't available in the Shipping carrier [sn_itam_shipping_carrier] table, then that row isn't imported. Also, no shipment record is created. You must do one of the following and reimport the file: ○ The shipping carrier must be included in the Shipping Carriers list. For more details, see Create a shipping carrier record. ○ The value of the sn_hamp.enable_shipping_carrier_validation_asn system property must be set to **false**. • Receive an asset: When the assets are received. **Note:** The shipment record is created in the Delivered stage.	The purchase order is received.
Transfer order	The Ship task of the Transfer order line item is closed.	The transfer order line item is delivered.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sources of shipments (continued)

Source flow	Task source for shipment record creation	Source for updating the shipment record to Closed or Delivered
		Note: You can change the tracking number until the Transfer order line item is in the In Transit stage.
Lease expiration	The Ship task of the Return lease action is closed.	Return confirmation task is closed.
Return Merchandise Authorization (RMA)	**1.** The Shipment task of the Off-site return action is closed. **2.** The Vendor RMA decision task is closed.	**1.** Vendor RMA decision task is closed. **2.** The Receive task is closed.
Asset reclamation	The Schedule shipment task for the Ship reclaim method is closed.	The Receive asset task is closed.
Zero Touch Refresh	The Request shipment task is closed.	The User asset receive task is closed.

Remote task definition inbound and outbound fields

The inbound and outbound fields of the remote task definition required for the Zero Touch Refresh flow.

Inbound field values

For each field, the source table and target table are the Zero Touch Refresh Fulfillment Request table [sn_itam_ztr_fulfillment_req].

The **Target field** value is the same as the **Source field** value. The value in the source field is sent from the source table on the requester's ServiceNow instance to the target field in the table on the provider's instance to which the source field is synced.

The **Sync when** value is **Insert**, which updates the target field on the remote task's parent record only when the remote task is initially inserted.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inbound fields

Field label	Field name	Max length	Source field
Customer request number	customer_request_number	40	Customer request number
Model	model	255	Model
State	state	40	State
Name	name	151	Name
Email	email	100	Email
Mobile	mobile	40	Mobile
Street	street	255	Street (street)
City	city	40	City (city)
State or Province	state_loc	40	State/Province (state_loc)
Country	country	40	Country (country)
Zip or Postal code	zip	40	Zip/Postal code
Return name	return_name	151	Name (return_name)
Return street	return_street	255	Street (return_street)
Return city	return_city	40	City (return_city)
Return state or province	return_state_loc	40	State/Province (return_state_loc)
Return country	return_country	40	Country (return_country)
Return zip or postal code	return_zip	40	Zip/Postal code (return_zip)

Outbound field values

For each field, the source table and target table are Zero Touch Refresh Fulfillment Request table [sn_itam_ztr_fulfillment_req].

The **Target field** value is the same as the **Source field** value. The value in the Source field is sent from the source table on the provider's ServiceNow instance to the target field on the table on the requester's instance to which the source field is synced.

The **Sync when** value is **Insert and Update**, which updates the target field on the remote task's parent record every time the remote task is updated.

Outbound fields

Field label	Field name	Max length	Source field
Serial number	serial_number	100	Serial number
Asset tag	asset_tag	40	Asset tag
State	state	40	State

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Outbound fields (continued)

Field label	Field name	Max length	Source field
Tracking number	tracking_number	40	Tracking number (tracking_number)
Carrier	carrier	80	Carrier (carrier)
Return tracking number	return_tracking_number	40	Tracking number (return_tracking_number)
Return carrier	return_carrier	80	(return_carrier)

Decision tables for Hardware Asset Management flows

These readily available decision tables help you customize the flows in some of the Hardware Asset Management features.

Decision tables

Hardware Asset Management features	Decision tables
Hardware Asset Refresh	Hardware Asset Refresh Line Flow
Lease Contract Expiration	Lease Contract Expiration Flow
Leased Asset Buyout	Leased Asset Buyout Flow
Leased Asset Extension	Leased Asset Extension Flow
Leased Asset Return	Leased Asset Return Flow
Loaner Asset Request	Loaner Asset Request Flow
Source request from local stockroom	Asset Local Order Subflow **Note:** The Asset Local Order Subflow decision table is available with both Hardware Asset Management and Procurement plugins.
Reclamation	Asset Reclamation Flow
Hardware reclamation flow	Hardware Asset Reclamation Flow, Hardware Asset Reclamation Line Flow
RMA request	Asset RMA Flow
RMA on-site repair	Asset RMA On-site Flow
RMA off-site repair	Asset RMA Off-site Flow
Contract renewal request	Contract Renewal Flow
Contract renewal tasks	Contract Renewal Tasks Flow

Service Catalog variable form fields

Fields on the variable help you to define variables for a catalog item.

Field	Description
Application	Read-only field that indicates the application can use this variable.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Type	The variable type that you want to create.
Catalog item	Catalog item associated with the variable.
Order	Order in which the variable is placed on the catalog item page. The variables are organized with lowest order value on the top and greatest order value at the bottom.
Active	Option to make the variable available for use.
Mandatory	Option to mark the variable as required to order the catalog item.
Read only	Option to make the variable read only.
Hidden	Option to hide the variable.
Question tab	
Question	Question to ask when ordering the catalog item.
Name	Name to identify the question. **Note:** If this field is empty, its value is auto-populated based on the **Question** field.
Tooltip	Tooltip text to display when you hover over the variable. Enter a brief note to describe the purpose of the Question.
Example text	Hint that is displayed in the question field before you enters a value. Applicable for the following variables: • IP Address • Email • URL • Single Line Text • Wide Single Line Text • Multi Line Text • Date • Date/Time
Annotation	
Show help	Option to provide additional help and instructions for the variable.
Help tag	Tag to display the Help text. For example, "More information."
Help text	Help information for a service catalog variable.
Instructions	Information that requires rich text formatting or adding images to support help information.
Type specifications The fields in this section vary for each variable type.	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Variable Width	Width of the variable on the catalog item page, to specify what percentage of the screen size that it can span.
Enable also request for	Option to allow a catalog item request to be submitted for multiple users. After you select this option, the **Also request for** field is displayed along with **Requested For** variable in a catalog item.
Roles to use also request for	Option to specify the roles that can submit a catalog item request for multiple users.
Choice direction	The direction in which the list is arranged. • **Across**: Arranges choices horizontally. • **Down**: Arranges choices vertically. This field appears for lookup multiple choice variables.
Choice field	Table field to populate options for the variable. If no choices are defined for a field, then the variable loads field-related distinct values from the table. This field appears for select box variables.
Choice table	Table with values to populate in the **Choice field**. This field appears for select box variables.
Don't select the first choice	Check box to leave all options for the variable cleared on the catalog item page. If this check box is selected, the first choice for the variable selected by default. This field appears for multiple choice and numeric scale variables.
Dynamic ref qual	Dynamic qualifier. Select a dynamic filter to run a query against the reference field. This field appears for reference variables when **Use reference qualifier** is set to **Dynamic**.
Include none	Check box to include the **None** option in a list of choices. This field appears for lookup multiple choice, lookup select box, multiple choice, and select box variables.
Layout	Layout for a container. This field appears for container start variables.
List table	Table with the values for the list collector. The table should have a display column specified. For more This field appears for list collector variables.
Lookup from table	Table from which values are obtained for users to select. The values from this table are populated in the Lookup value field. This field appears for lookup multiple choice and lookup select box variables.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Lookup value field	Field in the lookup table that populates options for the variable. This field appears for lookup multiple choice and lookup select box variables.
Lookup label field(s)	Comma-separated list of fields in the lookup table whose values are used to display options. This field appears for lookup multiple choice and lookup select box variables.
Lookup price field	Field in the lookup table whose value is used to modify the price of the item being ordered. This field appears for lookup multiple choice and lookup select box variables.
Lookup recurring price field	Field in the lookup table whose value is used to modify the recurring price of the item being ordered. This field appears for lookup multiple choice and lookup select box variables.
Macro	UI macro to insert into the catalog item. This field appears for macro, macro with label, and UI page variables.
Summary macro	Applicable only for Macro, and Macro with Label type variables.
Widget	Applicable only for Marco, and Macro with Label type variables.
Price if checked	Price of the item. This field appears for check box variables.
Recurring price if checked	Price that increments for the item when you request more than one order of the item. This field appears for check box variables.
Reference	Reference table for the variable. The table should have a display column specified. This field appears for reference variables.
Reference qual	Qualifiers to restrict data that is available in the field. Supports reference qualifiers and advance qualifiers. This field appears for list collector, lookup multiple choice, lookup select box, reference, and Requested For variables. The field also appears for reference variables when **Use reference qualifier** is set to **Dynamic**.
Reference qualifier condition	Options to build conditions. This field appears for reference variables when **Use reference qualifier** is set to **Simple**.
Scale max	Highest value on the scale of available options for the variable. This field appears for numeric scale variables.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Scale min	Lowest value on the scale of available options for the variable. This field appears for numeric scale variables.
Unique values only	Check box to require a unique value for the field. When this check box is selected, two records can't have the same value for that field. This field appears for lookup multiple choice, lookup select box, and select box variables.
Use confirmation	Check box to prompt users to reenter data to verify their entries. This field appears for masked variables.
Use encryption	Check box to store the answer in encrypted format in the database. If not encrypted, the answer is stored in plain text format. This field appears for masked variables.
Use reference qualifier	Type of qualifier to use. This field appears for reference variables.
Validation Regex	Regular expression that validates the variable value. This field is displayed only for Single Line Text and Wide Single Line Text variable types.
Variable attributes	Attributes that define the behavior and restrictions for a variable.
Default value	
Default value	Default value for the variable.
Auto-populate	
Dependent question	Reference type variable for the catalog item. This field is used to auto-populate the variable.
Reference	Reference field for auto-populating the variable.
Permission If no role is specified in this tab for the read, write, or create actions, all users who can access the catalog item can perform these actions irrespective of their role. A user with a role that doesn't match any of the following roles can't set variable values even through scripting. These roles aren't available for Label, Break, Container Split, Container End, Macro, Macro with Label, and UI Page variables.	
Read roles	Roles that can view the variable before or after requesting the catalog item or record producer. Only a user with the roles specified in this field can view the variable.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Write roles	Roles that can edit the variable in the variable editor after requesting the catalog item. If a user doesn't have the roles specified in this field, the variable is read-only in the variable editor.
Create roles	Roles that can create values for the variable before requesting the catalog item or record producer. If a user doesn't have the specified role, the variable is read only before requesting the catalog item or record producer.
Availability	
Visible Elsewhere	If selected, the variable appears on the item form before ordering the item, in the Variable Editor after ordering the item, and in the cart view of the item.
Visible on Bundles	If selected, the variable appears when the item is added to a bundle.
Visible on Guides	If selected, the variable appears when it's added to an order guide, or when it's added to a catalog item that is included in the order guide. **Note:** If an order guide has too many items and variables, consider clearing this check box on as many items as possible, to improve loading performance on order guides.
Visible on Summaries	If selected, the variable appears on any variable summarizer of the catalog item.

Asset put away task fields

Fields on the Asset put away task form help you create a put away task for the in stock assets.

Create New Asset put away task form

Field	Description
Number	Task number. This field is automatically set.
State	Current state of the Asset put away task. When a new task is created, this field is automatically set to **Open**.
Asset	Asset for which the put away task is created. All the in stock assets are listed.
Task name	Name of the task. This field value is automatically set to **Put away**.
Stockroom	Stockroom for the task. This field value is automatically populated when the asset is selected.
Assignment group	Assignment group to which you want to assign the Asset put away task.
Drop off location	Aisle and space in the stockroom where you want to put away the hardware asset. This value is required to close the Asset put away task.
Assigned to	Person from the assignment group who is primarily responsible for the Asset put away task.
Due date	Date by which the Asset put away task should be closed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Asset put away task form (continued)

Field	Description
Notes	Notes about the task. The **Short description** and **Description** field values are automatically populated.

Read-only and client script modifiable fields in HAM tables

Comprehensive reference of HAM table fields that are restricted from UI editing and those which can be modified using client scripts.

Strict read-only fields in HAM tables

Strict read-only field details

Table	Fields
Asset [alm_asset]	• Audit number [audit_number] • Audit type [audit_type] • Audited by [audited_by] • Disposal order number [disposal_order_number] • Last audit date [last_audit_date] • Last audit state [last_audit_state] • Process ID [process_id] • Process table [process_table] • Refresh request line [refresh_request_line] • Attestation number [attestation_number] • Attested by [attested_by] • Last attestation date [last_attestation_date] • Last attestation state [last_attestation_state] • Disposal order number [sn_itam_common_disposal_order_number]
Asset Covered [clm_m2m_contract_asset]	• Flow context [flow_context] • Extension contract [lease_extension_contract] • Purchase order line [po_line_item] • Stage [stage]
Consumable Model Lifecycle [cmdb_consumable_model_lifecycle]	Content active [content_active_status]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
Consumable Model [cmdb_consumable_product_model]	• License opt in [norm_license_opt_in] • Normalization combination [normalized_combination] • Normalized date [normalized_date] • Normalization hash 1 [normalized_hash1] • Normalization hash 2 [normalized_hash2] • Normalization hash 3 [normalized_hash3] • Normalization hash 4 [normalized_hash4] • Normalization rule [normalized_rule] • Normalized rule table [normalized_rule_table] • Normalization status [normalized_status] • Normalization status summary [normalized_status_summary]
Hardware Model Lifecycle [cmdb_hardware_model_lifecycle]	Content active [content_active_status]
Hardware Model [cmdb_hardware_product_model]	• License opt in [norm_license_opt_in] • Normalization combination [normalized_combination] • Normalized date [normalized_date] • Normalization hash 1 [normalized_hash1] • Normalization hash 2 [normalized_hash2] • Normalization hash 3 [normalized_hash3] • Normalization hash 4 [normalized_hash4] • Normalization rule [normalized_rule] • Normalized rule table [normalized_rule_table] • Normalization status [normalized_status] • Normalization status summary [normalized_status_summary]
Product Model [cmdb_model]	• Norm Status Sumry Function [norm_status_sumry_function] • TRM product phase [trm_product_phase]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
Model Category [cmdb_model_category]	Resource category [resource_category]
Asset Audits [sn_hamp_asset_audit]	• Audit number [audit_number] • Excluded from HAM [excluded] • Scanned and expected [expected] • New [new] • Scanned and not expected [not_expected] • Expected and not found [not_found] • Scan date [scan_date] • Status [status]
Hardware Asset Reclamation Line [sn_hamp_asset_reclaim_line]	• Asset [asset] • Asset reclamation request [asset_reclaim_request] • Flow context [flow_context] • Number [number] • Stage [stage]
Hardware Asset Reclamation Task [sn_hamp_asset_reclaim_task]	• Hardware asset reclamation line [asset_reclaim_line] • Start date [start_date] • Task name [task_name]
Asset RMA Task [sn_hamp_asset_rma_task]	• RMA request line [rma_request_line] • Task name [task_name]
Hardware Disposal Order [sn_hamp_hardware_disposal]	• Number [number] • Stage [stage]
Hardware Disposal Tasks [sn_hamp_hw_asset_disposal_task]	• Departed [departed_assets] • Expected [expected_assets] • Not departed [not_departed_assets] • Not verified [not_verified_assets] • Substate [substate]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
	• Task name [task_name] • Verified [verified_assets]
Device Type [sn_hamp_hw_device_type]	• Stage active [stage_active] • Stage description [stage_description] • Stage name [stage_name] • Stage UNSPSC commodity ID [stage_unspsc_commodity_id] • Class [sys_class_name]
Hardware Manufacturer [sn_hamp_hw_manufacturer]	• Name [name] • Stage active [stage_active] • Stage description [stage_description] • Stage name [stage_name] • Stage webpage [stage_webpage] • Class [sys_class_name] • Webpage [webpage]
Hardware Normalization Map [sn_hamp_hw_normalization_map]	• Hash [hash] • Product [hw_product] • Product model [hw_product_model] • Class [sys_class_name]
Hardware Product [sn_hamp_hw_product]	• Stage active [stage_active] • Stage description [stage_description] • Stage device type [stage_device_type] • Stage manufacturer [stage_hw_manufacturer] • Stage name [stage_name] • Class [sys_class_name]
Hardware Model Library [sn_hamp_hw_product_model]	• Stage active [stage_active] • Stage description [stage_description] • Stage product [stage_hw_product] • Stage model number [stage_model_number]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
	• Stage name [stage_name] • Class [sys_class_name]
Hardware Asset Refresh Line [sn_hamp_hw_refresh_line]	• Flow context [flow_context] • Number [number] • Replacement model [replacement_model] • Request item [request_item] • Stage [stage]
Refresh Line Tasks [sn_hamp_hw_refresh_line_task]	Replacement model [replacement_model]
HAMP Import File [sn_hamp_import_file]	• Details [details] • File name [file_name] • Status [status]
Hardware Lifecycle Definition [sn_hamp_lifecycle_definition]	• Product model [hw_product_model] • Lifecycle code [lifecycle_code] • Lifecycle phase [lifecycle_phase] • Phase start date [start_date] • Class [sys_class_name]
Loaner Asset Order [sn_hamp_loaner_asset_order]	• Asset Prepared [asset_prepared] • Flow context [flow_context] • Justification [justification] • Lead Time [lead_time] • Loaner order status [loaner_order_status] • Preparation start date [preparation_start_date] • Request type [request_type] • Return Date [return_date] • Stage [stage] • Start Date [start_date]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
Audits to Scanned Assets [sn_hamp_m2m_audit_asset]	• Asset [asset] • Asset audit [asset_audit] • Audit status [audit_status]
Planned Assets [sn_hamp_m2m_hw_asset_disposal]	• Scanned [depart_scanned] • Hardware disposal order [hardware_disposal] • Stage [stage] • Scanned [verify_scanned]
Replacement Models [sn_hamp_m2m_ztr_replacement_model]	Zero touch refresh model [refresh_model]
Manage Hardware Library [sn_hamp_manage_hw_library]	Status [status]
HAM Maturity Content [sn_hamp_maturity_content]	• Staging type [stage_type] • Type [type]
HAM Maturity Item [sn_hamp_maturity_item]	Type [type]
Model Category Normalization Summary [sn_hamp_model_ctg_norm_summary]	Model category [model_category]
sn_hamp_provider_task_mapping	Status [status]
HAM Resource Category [sn_hamp_resource_category]	• Opt in [opt_in] • Resource Category [resource_category] • Schedule item [schedule_item] • Subscription unit ratio [su_ratio]
RMA Request [sn_hamp_rma_request]	• Flow context [flow_context] • Number [number]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
	• Stage [stage] • State [state]
RMA Request Line [sn_hamp_rma_request_line]	• Asset [asset] • Flow context [flow_context] • Model [model] • Number [number] • Quantity [quantity] • RMA request [rma_request] • Stage [stage]
Zero touch request task [sn_hamp_zero_touch_request_task]	• Number [number] • Task name [task_name] • Zero touch request [zero_touch_request]
Zero Touch Refresh Request [sn_hamp_ztr_request]	• Asset [asset] • City [city] • Country [country] • Email address [email] • Zero touch refresh fulfillment request [fulfillment_request] • Mobile number [mobile] • Name [name] • Number [number] • Order state [order_state] • Provider [provider] • Refresh method [refresh_method] • Replacement model [replacement_model] • Requested for [requested_for] • Return stockroom [return_stockroom] • RMA request [rma_request] • Stage [stage] • State [state] • State/Province [state_loc]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
	• Street [street] • Zip/Postal code [zip]
Zero Touch Refresh Task [sn_hamp_ztr_task]	• Number [number] • Substate [substate] • task name [task_name] • Zero touch refresh request [zero_touch_req]
Zero Touch Refresh Fulfillment Request [sn_itam_ztr_fulfillment_req]	Provider [provider]
Pallet [alm_pallet]	Number [pallet_number]
Transfer Order Line Task [alm_transfer_order_line_task]	Substate [substate]
Asset Task [asset_task]	DaaS account [daas_account]
Contract [ast_contract]	• Flow context [cmn_flow_context] • Process ID [process_id] • Process table [process_table] • Substate [substate]
Contract History [clm_contract_history]	• Previous contract ends [previous_contract_ends] • Previous contract Id [previous_contract_id] • Previous contract starts [previous_contract_starts] • Renewal date [renewal_date]
Model Lifecycle [cmdb_model_lifecycle]	• Lifecycle code [lifecycle_code] • Source [source]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
itam_aia_log	• AI agent feature [aia_feature] • Number [number] • Source [source] • Source table [source_table] • Domain [sys_domain] • User [user]
Purchase Order [proc_po]	• Purchase order type [purchase_order_type] • Source ID [source_id] • Source table [source_table] • PO type [po_type]
Purchase order line items [proc_po_item]	• Source ID [source_id] • Source table [source_table]
Contract Renewal Request [sn_contract_renewal_request]	• Approval [approval] • Approval history [approval_history] • Contract [contract] • Flow context [flow_context] • Number [number] • Stage [stage] • State [state]
Contract Renewal Request Line [sn_contract_renewal_request_line]	• Contract [contract] • Contract administrator [contract_administrator] • Applicable taxes [contract_applicable_taxes] • Contract approver [contract_approver] • End date [contract_ends] • Invoice payment terms [contract_invoice_payment_terms] • Payment amount [contract_payment_amount] • Payment schedule [contract_payment_schedule] • Options [contract_renewal_options]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
	• Contract renewal request [contract_renewal_request] • Name [contract_short_description] • Start date [contract_starts] • Tax cost [contract_tax_cost] • Effective tax rate[contract_tax_rate] • Total cost [contract_total_cost] • Flow context [flow_context] • Number [number] • Renewal contract [renewal_contract] • Stage [stage] • State [state] • Contract number [vendor_contract]
Contract Renewal Task [sn_contract_renewal_task]	• Contract renewal request [contract_renewal_request] • Contract renewal request line [contract_renewal_request_line] • Renewal approver [renewal_approver] • Renewal contract [renewal_contract] • Task name [task_name]
sn_daas_common_rma_response_orderline	• Flow context [flow_context] • Shipment order [shipment_order] • Stage [stage]
Carrier Integration Profile [sn_itam_carrier_int_profile]	Job [job]
Import asset data rows [sn_itam_cmn_import_asset_row]	• Asset [asset_id] • Model [model_id] • Status [status]
Asset attestation [sn_itam_common_asset_attestation]	• Attestation number [attestation_number] • Requested by [requested_by] • Schedule [schedule]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
	• Submission date [submission_date] • Domain [sys_domain] • Table [table]
Asset Audits [sn_itam_common_asset_audit]	Audit number [audit_number]
Asset remediation task [sn_itam_common_asset_rmdt_task]	Task name [task_name]
Asset Warranty [sn_itam_common_asset_warranty]	• Active [active] • Asset [asset] • Country [country] • Description [description] • End date [end_date] • External warranty ID [external_warranty_id] • Name [name] • Start date [start_date] • Status [status] • Type [type]
Attestations for asset [sn_itam_common_attestation_asset_m2m]	• Asset [asset] • Asset attestation [attestation] • Attestation date [attestation_date] • Domain [sys_domain] • User [user]
Asset attestation schedule [sn_itam_common_attestation_schedule]	• Requested by [requested_by] • Schedule number [schedule_number] • Domain [sys_domain] • Table [table]
Calculated Lifecycle formula [sn_itam_common_calc_lc_formula]	Name [name]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
Asset Donation Order [sn_itam_common_donation_order]	• Number [number] • Stage [stage]
Asset Donation Task [sn_itam_common_donation_task]	• Departed [departed_assets] • Expected [expected_assets] • Not departed [not_departed_assets] • Substate [substate] • Task name [task_name]
sn_itam_common_inbound_asset_order	• Source order [source_order] • Source order table [source_order_table]
sn_itam_common_inbound_asset_orderline	• Flow context [flow_context] • Shipment order [shipment_order] • Stage [stage]
Lifecycle Code [sn_itam_common_lifecycle_code]	• Code [code] • Long description [long_description] • Short description [short_description]
Planned Assets [sn_itam_common_m2m_ast_donation]	• Asset donation order [asset_donation_order] • Stage [stage]
Shipment line [sn_itam_common_m2m_shipment_asset]	• Alert [alert] • Stage [asset_stage]
Stockroom Distribution Channel [sn_itam_common_m2m_stockroom_channel]	Function [function]
Asset prepare task [sn_itam_common_prepare_task]	Task name [task_name]
Asset put away task [sn_itam_common_put_away_task]	Task name [task_name]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only field details (continued)

Table	Fields
Import asset data [sn_itam_common_receive_import]	• Number of rows with errors [rows_errors] • Number of rows processed [rows_processed] • Number of rows ready to be received [rows_ready] • Number of rows successful [rows_successful] • Status [status]
Schedule task [sn_itam_common_schedule_task]	Task name [task_name]
Asset selection task [sn_itam_common_selection_task]	Task name [task_name]
Asset ship task [sn_itam_common_ship_task]	• Shipment order [shipment_order] • Task name [task_name]
Shipment [sn_itam_common_shipment]	• Shipment number [shipment_number] • Stage [stage] • Shipment quantity [shipment_quantity]
Shipping Carrier [sn_itam_common_shipping_carrier]	Profile mapped date [profile_mapped_date]
Renewal contracts [sn_m2m_renewal_contract]	Renewal task [renewal_task]

Client script modifiable fields in HAM tables

Client script modifiable fields

Table	Fields
Hardware alm_hardware	Failure risk score [risk_score]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware Asset Management system properties

System properties control asset lifecycle, procurement, inventory, reporting, and system configuration for the Hardware Asset Management application. You can view and update these properties from the Properties setup item in the Configuration Console.

Asset lifecyle and operations

Property	Description
glide.asset.create_ci_with_ire	Controls whether a configuration item (CI) is created along with an asset using IRE API.
glide.create_alm_asset.async	Controls when an asset is created relative to its configuration item. When set to true, asset creation is deferred and processed by the scheduled job *Asset - Create asset delayed sync*. When set to **false**, the asset is created immediately when the configuration item is created.
sn_itam_enable_cache_for_asset_ci_mapping	Turns on caching for the following mappings to improve performance: • Asset and CI fields • Asset state and CI install status • Asset state and CI hardware status
sn_itam_enable_pid_recalculation_for_child_asset	Controls whether the Product Instance

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset lifecyle and operations (continued)

Property	Description
	Identifier (PID) is recalculated for child assets when the parent asset is updated.
sn_itam_exclude_ibi_asset_reporting	Excludes Install Base Item (IBI) assets from the Asset Workspace reports and Important actions on the Overview page.
sn_hamp.update_assets_norm_model_name	Controls whether asset records are updated with the normalized model name when normalization runs.
sn_hamp.enable_asset_tag_serial_number_edits	Enables user to update asset tag and serial number of the asset to be received on the Employee Center Portal.
sn_hamp.approximate_dates_in_hw_lifecycle	Boolean flag for hardware lifecycle date calculations. When true, the report uses all content table rows and inherits approximate dates. When false, only researched dates are used.
sn_itam_enable_caching_for_depreciation	Turns on caching for depreciation formula in *Calculate Depreciation* scheduled job.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset lifecyle and operations (continued)

Property	Description
sn_hamp.enable_asset_action_validation_incident	Controls whether an asset action is required to close an incident. When set to **true**, users must specify an asset action before closing an incident. When set to **false**, asset action validation is skipped on incident closure.
sn_hamp.enable_asset_action_validation_change_request	Controls whether an asset action is required to close a change request. When set to **true**, users must specify an asset action before closing a change request. When set to **false**, asset action validation is skipped on change request closure.
glide.asset.procurement.sourcing.local_stock_transfer	Controls whether local stock transfers are used as a sourcing option during procurement.
sn_itam_common.enable_asset_attestation_playbook	Allows asset manager to enable playbook for asset attestation request
sn_itam_common.close_attestation_async	Controls whether the closure check for attestation records runs asynchronously. When set to **true**,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset lifecyle and operations (continued)

Property	Description
	an asynchronous check runs to determine if the attestation record needs to be closed when a user confirms an asset in the attestation request.
sn_hamp.migrate_hamaudit	Controls whether HAM audit data is migrated to the common audit table. When set to **true**, audit data moves to the common table. Note that migrating audit data removes access for users with the inventory_user and inventory_admin roles. Configure the appropriate ACLs before enabling this property to maintain user access to audits.
sn_itam_common.sn_enable_indoormap_for_assets	Turns on indoor map functionality for assets forms and dashboards.
sn_itam_common.receive_assets_batch_size	Determines the batch size of the asset records when logging import and receiving jobs.
sn_itam_trigger_depreciation_job_after_days	Sets the number of days that must pass since the last depreciation job run before the depreciation

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset lifecyle and operations (continued)

Property	Description
	job is allowed to run again. Default is 7 days.
sn_hamp.model_lifecycle_phase_order	Sets the priority order of hardware model lifecycle phases when multiple phases share the same start date. Enter the lifecycle phase names as a comma-separated list in increasing order of priority.
sn_itam_depreciation_job_last_run	Records the date and time the depreciation job last ran. This is a read-only, system-managed value.
sn_itam_common.put_away_task.drop_off_location.delimiter	Sets the delimiter used to separate drop-off location values in put-away tasks. The drop-off location format is `Location|| Stockroom|| Aisle|| Space`. The default delimiter is `||`.
sn_itam_common.set_default_include_consumables	Sets the default value of the **Include consumables** field on the Asset Audits form.

Procurement and inventory

Property	Description
com.sn_itam.enable_flow_designer.transfer_order_line	Turns on Workflow Studio

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procurement and inventory (continued)

Property	Description
	for processing transfer order line flows.
com.sn_itam.enable_flow_designer.transfer_order	Turns on Workflow Studio for processing transfer order flows.
sn_itam_common.sn_contract_enable_renewal_flow	Turns on the contract renewal flow. When enabled, users can choose between the task-based contract renewal workflow and the classic flow.
sn_itam_po_hide_edit_icon_on_currency_fields	Controls the visibility of the edit icon on currency fields in purchase order and purchase order line item records. When set to **true**, the edit icon is hidden on these fields.
com.sn_itam.enable_flow_designer.source_request	Turns on Workflow Studio for processing source requests.
com.sn_itam.enable_flow_designer.contract_approval	Turns on Workflow Studio for processing contract approvals.
contract_compliance_check_job.enable_override	Controls whether child table compliance checks override parent table checks during contract compliance processing.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procurement and inventory (continued)

Property	Description
	When set to **true**, child table compliance checks take precedence over parent table checks on the same field during contract compliance processing.
contract_compliance_check_job.batching	Turns on batching for contract compliance check processing.
glide.model.catalog_item_currency	Sets the currency of catalog items published from a model to the currency defined on that model.
sn_hamp.enable_shipping_carrier_validation_asn	Controls shipping carrier validation during Advanced Shipment Notification imports. When enabled, imported carrier data must exist in the shipping carrier table; rows with unrecognized carriers are ignored. Disable this property to skip validation.
glide.itam_update_ci_status_from_ritm	Controls which configuration items are updated from a requested item. Defaults to **true** for upgraded instances and

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procurement and inventory (continued)

Property	Description
	false for new installs and zBoot instances.
sn_itam_tol_bulk_update_max_count	Sets the maximum number of records that can be updated in a single bulk transfer order line operation.
sn_itam_stockrulejob_batch_size	Sets the batch size for processing stock rule data and logging results in the asset job log.
contract_compliance_check_job.batchSize	Sets the batch size for the Contract Compliance Check job.

Reporting

Property	Description
glide.sg.voice_search.enabled	Controls whether voice search is enabled in the Service Graph mobile application. When true, users can use voice input to perform searches.
sn_itam_common.asset_tco_benchmark_threshold_percentage	Sets the percentage multiplier used to compute the TCO benchmark threshold

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reporting (continued)

Property	Description
	from the TCO benchmark cost.

System configuration

Property	Description
glide.cmdb_model.display_name.shorten	Generate shorter software model display name if the model name contains the manufacturer.
glide.sg.image.default.cmdb_model	Specifies the default placeholder image for hardware asset model records that have no image. When the **picture** field on a **cmdb_model** record is empty, the My Asset page on the Now Mobile app displays this image instead of a broken or empty thumbnail. Default value is `no_image_itam_mobile.png`.

Others

Property	Description
sn_hamp.enable_custom_category_licensing	Enables inclusion of custom category assets in HAM licensing for instances on pre-HAM V4 SKUs.
sn_hamp.sn_ham_active_entitlements	Comma separated list of active entitlements associated with the Hardware Asset Management application

Modules in the Configuration Console for HAM

Module-by-module listing of the setup items in the Configuration Console for HAM, with descriptions of what each item configures.

HAM Foundations

Setup items for core Hardware Asset Management configurations.

HAM Foundations setup items

Setup items	Description	Roles required
HAM Resource Category	Opt in or opt out of the Hardware Asset Management resource categories that are part of your HAM subscription. For more details,	ham_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HAM Foundations setup items (continued)

Setup items	Description	Roles required
	see Opt-in or opt-out of HAM license resource categories.	
Content service setup	Opt in or opt out of the Hardware Asset Management Content Service for each model category. When opted in, your ServiceNow instance shares unrecognized hardware and consumable model details with ServiceNow to improve the normalization library. For more information, see Opt-in to the Hardware Asset Management Content Service	ham_admin
Hardware content download	View and manage the scheduled jobs that control hardware content downloads. Select a job to review or update its schedule. For more information, see Import and export content data.	admin
Custom model categories	Create and manage custom model categories that extend the standard hardware, asset, and consumable model class hierarchy. For more details, see Create model categories.	ham_admin
CMDB Success Advisor	Access the CMDB success advisor dashboard for HAM to configure discovery probing settings that prevent duplicate hardware asset and configuration item records. **Prerequisites** • The CMDB Success Advisor plugin must be installed. • The sn_cmdb_admin and ham_admin roles are required for full configuration access. With only the ham_admin role, the dashboard opens in read-only mode. For more information, see Using CMDB success advisor for HAM.	ham_admin and sn_cmdb_admin
Scheduled jobs	View and manage scheduled jobs that support Hardware Asset Management operations, such as Hardware Normalization, lifecycle generation, licensing data, loaner asset allocations, and performance analytics scoring. You can view schedules, enable or disable jobs, and configure run intervals. Select a job to edit its schedule or configuration, or select **New** to create a scheduled job.	admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HAM Foundations setup items (continued)

Setup items	Description	Roles required
Properties	View and configure the system properties that control Hardware Asset Management behavior. Toggle Boolean properties On or Off, enter integer values, or select and enter values for string and choice properties. Properties are grouped into five categories: **1.** Asset lifecycle & Operations **2.** Procurement & Inventory **3.** Reporting **4.** System configuration **5.** Others	• **Asset lifecyle and operations** ○ ham_admin ○ sn_hamp.ham_system_admin ○ asset_system_admin ○ inventory_admin ○ procurement_system_admin • **Procurement and inventory** ○ ham_admin ○ asset_system_admin ○ contract_system_admin ○ procurement_system_admin ○ sn_hamp.ham_system_admin • **Reporting**: ham_admin • **System configuration**: model_manager • **Others**: ham_admin and sn_hamp.ham_system_admin

Team management

Setup items for managing the groups, users, and roles that support HAM operations.

Team management setup items

Setup item	Description	Roles required
Assignment groups	Create and manage assignment groups for Hardware Asset Management Select an existing group to edit its members and settings, or select **Add a group** to create a group. For more information, see Create a user group.	admin
Users	Create and manage records for users involved in HAM operations, including their details, roles, and group memberships. Select a user to update their details, or select **Add a user** to create a user record. For details, see Create a user.	admin
Roles	Create and manage the roles assigned to users and groups. Assign roles to control what each user or group can see and do within the application.	admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Team management setup items (continued)

Setup item	Description	Roles required
	Select **New** to create a role. For details, see Create a role.	

Otto

If ServiceNow Otto for Hardware Asset Management (HAM) is installed, expand the **Otto** module to enable and customize preconfigured AI skills to automate common HAM workflows. Selecting **Otto Skills** opens the [var.now-assist-admin] filtered to the **HAM** tab in a new window, where you can edit existing skill configurations. When done, close the window to return to the Configuration Console.

Operations

Setup items for asset Lifecycle, inventory, and asset integration configurations.

Asset Lifecyle setup items

Setup item	Description	Roles required
Contract Workflows	Turn the contract renewal flow on or off. When turned on, administrators can choose between the task-based contract renewal workflow and the classic flow. Toggle the setting to the required state. For more details, see Contract renewal workflow.	ham_admin
Asset Automation	Configure the Asset action column to appear automatically in the related lists of incident and change request records. Select **Configure** to add the column automatically. When you set the **Asset action** field to **Swapped**, the **Swapped CI** field also becomes available and must be completed before you can close the record. For more details, see Asset life-cycle automation.	ham_admin
Asset lifecycle category	Activate asset lifecycle category so it appears in the Service Catalog.	ham_admin and sn_hamp.ham_system_admin
Asset lifecycle catalog items	Activate asset lifecycle catalog items so they appear in the Service Catalog. Toggle the catalog item on to make it available in the Service Catalog.	ham_admin and sn_hamp.ham_system_admin
Asset lifecycle workflows	View and manage the workflows that support hardware asset lifecycle processes.	admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Lifecyle setup items (continued)

Setup item	Description	Roles required
	From the list, select a workflow to open it in Workflow Studio, where you can review or customize it.	

Inventory setup items

Setup item	Description	Roles required
Stockroom types	Create and manage stockroom types that classify the stockrooms in your ServiceNow instance. Select an existing type to edit it or select**New** to create a stockroom type. For more information, see Create a stockroom type.	ham_admin and sn_hamp.ham_system_admin
Stockrooms	Create and manage the stockrooms used to track hardware asset inventory. Select an existing stockroom to update its details or select **Add a stockroom** to create a stockroom. For more information, see Create a stockroom.	ham_admin and sn_hamp.ham_system_admin
Service locations	View and manage the service locations associated with your stockrooms. Select a record to edit it or select **New** to create a service location. For more information, see Associate a stockroom with service locations.	ham_admin and sn_hamp.ham_system_admin
Distribution channels	Create and manage the distribution channels that define how hardware assets move between stockrooms. Select an existing channel to edit it or select **New** to create one. For more information, see Link stockrooms into a distribution channel.	ham_admin and sn_hamp.ham_system_admin

Asset integration setup items

Setup item	Description	Roles required
Shipping integration profiles	View and manage carrier integration profiles that define the connection between your ServiceNow instance and a shipping carrier API. For more information, see Create a carrier integration profile.	ham_admin and asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset integration setup items (continued)

Setup item	Description	Roles required
	Note: Creating a profile requires completing the carrier API integration separately before the profile can be used. For more information, see Integration framework configuration for shipment tracking.	
Shipping carriers	Create and manage the shipping carriers used to associate with an integration profile. Select **New** to add a carrier and enter the details needed to support API integration with that carrier's shipping system. For more information, see Create a shipping carrier record.	ham_admin
Zero touch refresh	Create and manage zero touch refresh models that define which hardware assets are eligible for refresh. Select **New** to create a model, specifying the hardware model and location. When a model is active, eligible assets are automatically identified for refresh based on the configured criteria. For more information, see Configure replacement models for a refresh model.	ham_admin

Hardware Asset Management integrations

The Hardware Asset Management (HAM) application integrates with external systems and ServiceNow platform capabilities to extend asset data quality, lifecycle visibility, and device management across your organization.

Integration with Contract Management Pro

HAM integrates with Contract Management Pro to perform contract and obligation extraction from signed contract documents. This integration brings obligation management and agentic contract metadata extraction directly into the Hardware Asset Workspace.

Integration with Zero Touch Mobility

HAM integrates with Samsung SDS Zero Touch Mobility to manage the complete lifecycle of mobile devices on a single platform. This integration provides visibility into device utilization and costs across the organization.

Hardware Asset Management integration with Contract Management Pro

Use the Hardware Asset Management (HAM) and Contract Management Pro integration to perform contract and obligation extraction from signed contract documents.

Important: This feature is available only with Hardware Asset Management Prime SKU.

Types of hardware contract obligations

Hardware contracts carry specific commitments that must be tracked and fulfilled. The following contract types each introduce obligations that require active management:

Leases

Lease renewal dates must be monitored to prevent cost increases or unplanned loss of hardware access at expiration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Maintenance

Vendor service levels must be verified against contractual obligations to track performance.

Warranty

Warranty coverage must be tracked to avoid unexpected repair costs when coverage lapses.

Purchase

Payment terms and minimums must be met to avoid contractual penalties.

Benefits of integration

Integrating Hardware Asset Management with Contract Management Pro brings contract obligation management directly into the Hardware Asset Workspace, so you can track contractual commitments, manage renewals, and extract obligations from one place. This integration helps to reduce the risk of missed renewal deadlines, vendor service level failures, and compliance penalties. The integration provides access to the following post-signature contract data and workflows within the Hardware Asset Workspace:

Obligation Management

Create and manage obligation records and tasks directly from the Hardware Asset Workspace to track and fulfill the responsibilities specified in hardware contracts. For more information, see Obligation Management in the Contract Management Pro documentation. For more information about creating and managing obligation tasks in the Hardware Asset Workspace, see Manage obligations in the Hardware Asset Workspace.

Renewal Management

Receive notifications about contracts that are approaching renewal or expiration dates.

Metadata and obligation extraction

Extract key contract metadata and obligations automatically from an uploaded signed contract document using the manage contract repository agentic workflow. You must install Contract Management Pro Prime and ServiceNow Otto for Contract Management Pro (`sn_cm_gen_ai`) applications, and activate the generative AI skills to use this workflow. For more information about installing the plugin and enabling the skills, see Configure the Manage contract repository agentic workflow for HAM. For more information about extracting the key contract metadata and obligations from assigned contract, see Manage contract repository agentic workflow in the Hardware Asset Workspace.

Plugins required for HAM and Contract Management Pro integration

- Contract Management Pro Prime (sc_cm_pro)
- Obligation Management (sn_cm_obligation)
- ServiceNow Otto for Contract Management Pro (sn_cm_gen_ai)

Roles required for HAM and Contract Management Pro integration

With the Obligation Management (sn_cm_obligation) plugin activated, the following roles are available for the HAM administrator to assign.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles required

Role	Description
sn_cm_obligation.obligation_admin	Provides administrative access to Obligation Management and underlying data.
sn_cm_obligation.obligation_fulfiller	Creates obligations and approves, rejects, or cancels obligation tasks within the Hardware Asset Workspace.
sn_cm_obligation.obligation_user	Acts on the assigned obligation task and submits the task within Hardware Asset Workspace.
sn_cm_gen_ai.ai_contract_fulfiller	Extracts the information from a signed contract to add it to a warranty, maintenance, lease, or purchase contract record.
sn_cm_gen_ai.ai_contract_config	Activates or deactivates the Contract obligation extraction and Contract metadata extraction skills.
now_assist_panel_user	Accesses the ServiceNow Otto panel to activate or deactivate the skills.
sn_cm_gen_ai.ai_contract_admin	Provides administrative access to the Manage contract repository agentic workflow. Installs ServiceNow Otto for Contract Management Pro (sn_cm_gen_ai) plugin and activates the required skills.

Hardware Asset Management integration with Zero Touch Mobility

ServiceNow® Hardware Asset Management is integrated with Samsung SDS Zero Touch Mobility to manage the complete life-cycle of mobile devices.

The benefits of Hardware Asset Management integration with Zero Touch Mobility are as follows:

- Deploy, manage, and monitor mobile assets on a single platform leveraging automated workflows for day-to-day mobile device management tasks like the following:
  - Onboarding new devices
  - Unenrolling devices
  - Requesting new orders, upgrades, or replacements with self-service options
- Manage and report on the mobile device life-cycle with an integrated solution that improves visibility and collaboration across the organization.
- Optimize costs and utilization of all your mobile devices.

Requirements and limitations

Requirements and limitations for Hardware Asset Management integration with Zero Touch Mobility solution are as follows:

- The solution is dependent on the Hardware Asset Management (sn_hamp) application.
- Only the Mobile Device resource category is available. This resource category is opted-in automatically.

  Based on the acquisition method of assets, the following resource subcategories are available for the Mobile Device:
  - Bring Your Own Asset
  - Corporate Asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Only mobile devices are licensed under this solution. You can view the subscription details using the ITAM license report. For more information, see View the license report for the Hardware Asset Management application.

  Note: Even if Hardware Asset Management is activated explicitly on your ServiceNow instance, the mobile devices are licensed only under the Mobile Device resource category of the Hardware Asset Management integration with Zero Touch Mobility solution. For more information, see Licensing framework for Hardware Asset Management solutions.

- The following Hardware Asset Management features aren't available:
  - Hardware Model Normalization
  - Content upload and download
  - Performance Analytics Dashboard
  - Asset Executive Dashboard
  - Success Portal

  Note: HAM Guided Setup is available. However, it isn't required to run the setup.

  For more information on the Hardware Asset Management workflows and features, see Hardware Asset Management subscription.

Supported Hardware Asset Management features

The following Hardware Asset Management features are available without any restrictions:

- Stock order
- Advanced Shipment Notification
- Standard Asset Request flow
- Shipment carrier integration
- Advanced inventory and distribution
- Asset reclamation

The following Hardware Asset Management features have limited availability:

- HAM workflows: Non-mobile devices are excluded from the HAM workflows.
- Lease expiration flow: Non-mobile devices are excluded from this flow.
- Hardware Asset Workspace: Reports and dashboards related to normalization of assets aren't available.

Related topics

Exploring Hardware Asset Management

ServiceNow Otto for Hardware Asset Management (HAM)

Use the ServiceNow Otto for Hardware Asset Management (HAM) application to streamline and automate the hardware asset request process and the repair process with the agentic workflows.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Get started with AI

The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

For more information, see ServiceNow product tiers.

For more information on AI capabilities in HAM, see AI in Hardware Asset Management.

Important:

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

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 information about legal request and/or legal matter (including related field information, comments, and work notes). 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.

Device as a Service

The Device as a Service (DaaS) feature provides assets and asset management services to the customers of DaaS providers via a subscription model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

DaaS overview

https://player.vimeo.com/video/985181543?h=c47ec1ec8f&badge=0&autopause=0&player_id=0&app_id=58479

Managing your DaaS offerings on a single platform through provider-focused views and tasks brings significant advantages to both providers and customers. DaaS providers can manage their asset inventory from sourcing through disposal to support their DaaS offerings. By consolidating all DaaS - related activities and information onto one platform, DaaS providers can streamline their operations and improve efficiency. For more information, see DaaS provider view.

DaaS benefits

Benefit	Users
Plan the desired subscription level for the customers of the DaaS provider.	DaaS Asset manager
Automate the procurement process of the DaaS assets.	DaaS Asset manager
Manage inventory levels and prepare assets for shipment as requested by customers.	• DaaS Asset manager • Inventory user
Receive and pick assets at the customer site.	• DaaS Asset manager • Inventory user
Conduct audits on asset records for compliance and reporting purposes.	DaaS Asset manager
Monitor asset problems and perform repairs or replacements to restore service functionality.	• DaaS Asset manager • Inventory user
Systematically refresh, decommission, and dispose of assets at the end of their usable life according to a predetermined schedule.	• DaaS Asset manager • Inventory user

Configuring DaaS

Plan and configure the Device as a Service (DaaS) features and functionalities.

Configuration overview

Here's an overview of the process for configuring DaaS features and functionalities.

Configure Hardware Asset Management for DaaS

Step	Action	Resource
	Get the Hardware Asset Management application from the ServiceNow Store.	Install Hardware Asset Management from the ServiceNow Store

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure Hardware Asset Management for DaaS (continued)

Step	Action	Resource
Install Hardware Asset Management		
 Install Hardware Asset Management for DaaS	Get the Hardware Asset Management for DaaS application from the ServiceNow Store.	Install Hardware Asset Management for DaaS
 Mark assets as DaaS assets	Mark your assets as DaaS assets on the Hardware Asset Details form.	Asset record fields
 Explore DaaS provider view in Hardware Asset Workspace	Explore the intuitive DaaS provider view in Hardware Asset Workspace to manage the DaaS assets.	DaaS provider view
 Use Hardware Asset Management for DaaS	Use Hardware Asset Management for DaaS to offer assets and asset management services to the customers of DaaS providers.	• Managing inbound asset orders for DaaS assets • Managing RMA response orders for DaaS assets

Install Hardware Asset Management for DaaS

You can install the Hardware Asset Management for DaaS application (com.sn_daas_ham) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

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

Role required: admin

About this task

The following items are installed with Hardware Asset Management for DaaS:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Store applications
- Roles
- Tables

For more information, see Components installed with Hardware Asset Management for DaaS.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Hardware Asset Management for DaaS application (com.sn_daas_ham) 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.

   In the list next to the **Install** button, 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. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Managing inbound asset orders for DaaS assets

Following a request for a hardware asset, an inbound asset order is associated with this request by creating an order in the DaaS provider interface.

Completing the following tasks in the Inbound asset order workflow results in the successful completion of an asset order:

1. Create an inbound asset order
2. Create an inbound asset order line
3. Select an asset
4. Pick the selected asset
5. Prepare the picked asset
6. Ship the prepared asset
7. Receive the shipped asset

In a DaaS inbound asset order, the DaaS provider and the consumer are two separate organizations. The provider accepts an order from a consumer account, then prepares and ships the asset. When the consumer acknowledges receipt, the asset record in the provider's instance is set to **In use**. The **Assigned to** field on the provider's asset record remains empty because assignment is handled by the consumer's organization, not the provider.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create an inbound asset order

Create an inbound asset order to associate a customer request to an asset order.

Before you begin

Role required: sn_daas_ham.daas_asset_manager

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

About this task

For an inbound asset order to be considered complete, all its inbound asset order lines must reach the **Complete** stage.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **Inbound asset orders** tab.
4. Select **New**.
5. On the form, fill in the fields.

Create New Inbound asset order form

Field	Description
Number	Unique number for the inbound asset order.
External request reference	Customer-provided reference for the asset request that helps you track the source. For example, the customer has requested an asset through an email. Here, the external request reference would be `xyz@gmail.com`.
DaaS account	Associated DaaS account of the customer.
Delivery address	Designated delivery address for the asset.
State	Status of the inbound asset order. This field is automatically set to `Open`.
Requested for	The name of the customer associated with the DaaS account, for whom the asset is requested.
Estimated delivery date	Estimated delivery date of the asset that's being sent to the specified delivery address.

6. Select **Save**.

Result

- An inbound asset order with a unique number is created.
- **Inbound asset order line** tab is created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next
Create an inbound asset order line

Create an inbound asset order line

Create an inbound asset order line for every asset in an inbound asset order.

Before you begin
Role required: sn_daas_ham.daas_asset_manager

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

About this task
For an inbound asset order line to be considered complete, the **State** field of all its tasks must be **Closed Complete**.

Procedure
1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **Inbound asset orders** tab.
4. Select an inbound asset order number.
5. Select the **Inbound asset order lines** tab.
6. Select **New**.
7. On the form, fill in the fields.

Create New Inbound asset order line form

Field	Description
Number	Unique number for the inbound asset order line.
Inbound asset order	Unique number for the inbound asset order, which is associated with this order number line.
Model	Model of the asset as requested by the DaaS provider.
Quantity	Quantity of the asset. This field is automatically set to `1`.
Stage	Status of the inbound asset order. This field is automatically set to `Draft`.
Assigned to	The individual responsible for working on the inbound asset order line.
Asset	Asset that is selected matching the model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	This field automatically populates when you select an asset in the Asset selection task.

8. Select **Save**.

Result

- An inbound asset order line with a unique number is created for the requested asset.
- The **Stage** field is set to `Selection`.
- The **Asset tasks** tab is created, displaying a unique asset task number with the task type as **Asset selection task**.

What to do next

Select a DaaS asset matching the model specified by the DaaS provider.

Select an asset

Select a DaaS asset matching the model specified by the DaaS provider by using the Asset selection task.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **Inbound asset orders** tab.
4. Select an inbound asset order number.
5. Select the **Inbound asset order lines** tab.
6. Select an inbound asset order line number.
7. Select the **Asset tasks** tab.
8. Select the asset task number with the Task type as **Asset selection task**.
9. On the form, fill in the fields.

Asset Task Details form

Field	Description
Number	Unique number for the Asset selection task.
Asset order line	The inbound asset order line number associated with this task.
Due date	Estimated date of completing this task.
Stockroom	The designated stockroom where the asset is allocated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Model	This field is automatically populated with the details of the model provided while creating an inbound asset order line. For more information, see Create an inbound asset order line.
Task name	Name of the current task. This field is automatically set to `Select`.
State	Status of the Asset selection task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working on the Asset selection task.
Assigned to	The individual responsible for working on the Asset selection task.
Asset	List of DaaS assets that fulfill one or more of the following conditions: ○ Assets with **Status** as **In stock** and **Substate** as **Available** ○ An account is selected in the **DaaS account** field while creating an inbound asset order. ○ The **DaaS account** field is empty while creating an inbound asset order.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes (Private)	Notes about the task that are visible to all users within your organization.

10. Select **Close Task**.

Result

- After the Asset selection task is completed and you refresh the list, a task is created displaying a unique asset task number with the task type as **Asset pick task**.
- The **State** field of the Asset Selection task is set to **Closed Complete**.
- The **Stage** field of the Inbound asset order line is set to **Pick**.

What to do next

Pick the selected asset

Pick the selected asset

Pick the selected asset by using the Asset pick task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **Inbound asset orders** tab.
4. Select an inbound asset order number.
5. Select the **Inbound asset order lines** tab.
6. Select an inbound asset order line number.
7. Select the **Asset tasks** tab.
8. Select the asset task number with the Task type as **Asset pick task**.
9. On the form, fill in the fields.

Pick form

Field	Description
Number	Unique number for the Asset pick task.
Task name	Name of the current task. This field is automatically set to `Pick`.
Asset order	The inbound asset order number associated with this task.
Asset order line	The inbound asset order line number associated with this task.
Stockroom	The designated stockroom where the asset is allocated.
Asset	The asset that is selected in the Asset selection task. For more information, see Select an asset.
State	Status of the Asset pick task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working on the Asset pick task.
Assigned to	The individual responsible for working on the Asset pick task.
Due date	Estimated date of completing this task.
Drop off location	Location where the asset must be delivered.
Short description	Brief description of the task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Description	Detailed description of the task.
Work notes (Private)	Notes about the task that are visible to all users within your organization.

10. Select **Close Task**.

Result

- After the Asset pick task is completed and you refresh the list, a task is created displaying a unique asset task number with the task type as **Asset prepare task**.
- The **State** field of the Asset pick task is set to **Closed Complete**.
- The **Stage** field of the Inbound asset order line is set to **Prepare**.

What to do next

Prepare the picked asset by using the Asset prepare task.

Prepare the picked asset

Prepare the picked asset by inspecting the checklist and also check for any defects by using the Asset prepare task.

Before you begin

Role required: sn_daas_ham.daas_asset_manager and inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **Inbound asset orders** tab.
4. Select an inbound asset order number.
5. Select the **Inbound asset order lines** tab.
6. Select an inbound asset order line number.
7. Select the **Asset tasks** tab.
8. Select the asset task number with the Task type as **Asset prepare task**.
9. On the form, fill in the fields.

Prepare form

Field	Description
Number	Unique number for the Asset prepare task.
Asset order line	The inbound asset order line number associated with this task.
Due date	Estimated date of completing this task.
Stockroom	The designated stockroom where the asset is allocated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Model	This field is automatically populated with the details of the model provided while creating an inbound asset order line. For more information, see Create an inbound asset order line.
Task name	Name of the current task. This field is automatically set to `Prepare`.
State	Status of the Asset prepare task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working on the Asset prepare task.
Assigned to	The individual responsible for working on the Asset prepare task.
Asset	The asset that is selected in the Asset selection task. For more information, see Select an asset.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes (Private)	Notes about the task that are visible to all users within your organization.

10. Select **Close Task**.

Result

- After the Asset prepare task is completed and you refresh the list, another task is created displaying a unique asset task number with the task type as **Asset ship task**.
- The **State** field of the Asset prepare task is set to **Closed Complete**.
- The **Stage** field of the Inbound asset order line is set to **Ship**.

What to do next

Ship the prepared asset

Ship the prepared asset

Ship the prepared asset and capture the shipment details by using the Asset ship task.

Before you begin

Role required: sn_daas_ham.daas_asset_manager and inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **Inbound asset orders** tab.
4. Select an inbound asset order number.
5. Select the **Inbound asset order lines** tab.
6. Select an inbound asset order line number.
7. Select the **Asset tasks** tab.
8. Select the asset task number with the Task type as **Asset ship task**.
9. On the form, fill in the fields.

Ship form

Field	Description
Number	Unique number for the Asset ship task.
Asset order line	The inbound asset order line number associated with this task.
Due date	Estimated date of completing this task.
Asset	The asset that is selected in the Asset selection task. For more information, see Select an asset.
Shipping carrier	Organization that's responsible for shipping the assets to your customers. For example, FedEx.
Ship from	The origin location for shipping the assets.
Ship date	The shipment date for delivering the assets to your customers.
Task name	Name of the current task. This field is automatically set to `Ship`.
State	Status of the Asset ship task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working on the Asset ship task.
Assigned to	The individual responsible for working on the Asset ship task.
Tracking number	Tracking number or reference number of the shipment of the asset.
Ship to	Destination for the asset shipment.
Shipment order	Reference to the shipment record created in the Shipment [sn_itam_common_shipment] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	This field is automatically populated when the Asset ship task is closed.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes (Private)	Notes about the task that are visible to all users within your organization.

10. Select **Close Task**.

Result

- After the Asset ship task is completed and you refresh the list, another task is created displaying a unique asset task number with the task type as **Receive task**.
- The **State** field of the Asset ship task is set to **Closed Complete**.
- The **Stage** field of the Inbound asset order line is set to **Receive confirmation**.

What to do next

Receive the shipped asset

Receive the shipped asset

Once the shipment of the asset is complete, confirm the receipt of the asset by using the Receive task.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **Inbound asset orders** tab.
4. Select an inbound asset order number.
5. Select the **Inbound asset order lines** tab.
6. Select an inbound asset order line number.
7. Select the **Asset tasks** tab.
8. Select the asset task number with the Task type as **Receive task**.
9. On the form, fill in the fields.

Receive confirmation form

Field	Description
Number	Unique number for the Receive task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Asset order line	The inbound asset order line number associated with this task.
Due date	Estimated date of completing this task.
Asset	The asset that is selected in the Asset selection task. For more information, see Select an asset.
Asset received	Option to confirm the receipt of the asset. Values: ○ **Yes**: The asset is received by the customer. ○ **No**: The asset isn't received by the customer. **Note:** You must select **Yes** to close this task.
Task name	Name of the current task. This field is automatically set to `Receive confirmation`.
State	Status of the Receive task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working on the Receive confirmation task.
Assigned to	The individual responsible for working on the Receive task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes (Private)	Notes about the task that are visible to all users within your organization.

10. Select **Close Task**.

Result

- The **State** field of the Receive task is set to **Closed Complete**.
- The **Stage** field of the Inbound asset order line is set to **Completed**.
- The **State** field of the Inbound asset order is set to **Closed Complete**.

Managing RMA response orders for DaaS assets

Following a request for a hardware asset return or replacement, a Return Merchandise Authorization (RMA) order is associated with this request by creating an RMA response order in the DaaS provider interface.

Completing the following tasks in the RMA order workflow results in the completion and success of an RMA response order:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Create an RMA response order
2. Create an RMA response order line
3. Assess the RMA asset
4. Schedule a visit to the customer site or Ship the asset to the DaaS provider

> **Note:** Follow the next steps according to the values you select when scheduling a visit to the customer site or shipping the asset to the DaaS provider for assessing the RMA asset.

Create an RMA response order

Create a Return Merchandise Authorization (RMA) response order to associate an RMA request for an asset.

Before you begin

Role required: sn_daas_ham.daas_asset_manager

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

About this task

For an RMA response order to be considered as complete, all its RMA response order lines must reach the **Complete** stage.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select **New**.
5. On the form, fill in the fields.

Create New RMA response form

Number	Unique number for the RMA response order.
External RMA number	Customer-provided reference for the RMA request that helps you track the source.
DaaS account	Associated DaaS account of the customer.
Contact Email	Email of the customer who initiated the RMA request.
Delivery address	Address of the customer associated with the RMA request.
State	Status of the RMA response order. This field is automatically set to Open.
Requested for	Name of the customer associated with the DaaS account, for whom the asset is requested.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Opened by	Estimated delivery date of the asset that's being sent to the specified delivery address.
Customer mobile number	Mobile number of the customer who initiated the RMA request.
Device location	The physical whereabouts of the device currently in operation.
RMA justification	Reason of the RMA request creation provided by the customer.

6. Select **Save**.

Result

- An RMA response order with a unique number is created.
- **RMA response order lines** tab is displayed.

What to do next

Create an RMA response order line.

Create an RMA response order line

Create a Return Merchandise Authorization (RMA) response order line for every asset in an RMA response order.

Before you begin

Role required: sn_daas_ham.daas_asset_manager

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

About this task

For an RMA response order line to be considered as complete, the **State** field of all its tasks must be **Closed Complete**.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select an RMA order number.
5. Select the **RMA response order lines** tab.
6. Select **New**.
7. On the form, fill in the fields.

Create New RMA response order line form

Field	Description
Number	Unique number for the RMA response order line.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Parent	Unique number for the RMA response order, which is associated with this order number line.
Model	Model of the asset for which the customer has initiated an RMA request.
Quantity	Quantity of the asset. This field is automatically set to `1`.
Stage	Status of the RMA response order line. This field is automatically set to `Draft`.
Assigned to	The individual responsible for working on the RMA response order line.
Asset	List of assets that are in use and assigned to the customer.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

8. Select **Save**.

Result

- An RMA response order line with a unique number is created.
- The **Stage** field is set to `Assess`.
- The **Asset tasks** tab is created, displaying a unique asset task number with the task type as **RMA assessment**.

What to do next

Assess the RMA asset.

Assess the RMA asset

Assess the Return Merchandise Authorization (RMA) asset using either an on-site or off-site assessment procedure.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select an RMA order number.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select the **RMA response order lines** tab.
6. Select the asset task number with the Task type as **RMA assessment**.
7. On the form, fill in the fields.

RMA assessment form

Field	Description
Number	Unique number for the RMA assessment task.
Asset order line	The RMA response order line number associated with this task.
Due date	Estimated date of completing this task.
Asset	The asset that is selected while creating the associated RMA response order line. For more information, see Create an RMA response order line.
Assessment action	Assessment procedure to be followed for the RMA asset. ○ **On site**: A representative from the DaaS provider visits the customer's premises to assess the asset. ○ **Off site**: The asset arrives at the DaaS provider site for assessment. ○ **Denied**: The RMA request is rejected.
Task name	Name of the current task. This field is automatically set to RMA `assessment`.
State	Status of the RMA assessment task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working on the RMA assessment task.
Assigned to	The individual responsible for working on the RMA assessment task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

8. Select **Close Task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The result of the task completion changes according to the value selected in the **Assessment action** field:
  - If you select **On site**, a task is created displaying a unique asset task number with the task type as **Schedule** after you refresh the list. The **Stage** field of the RMA response order line is set to `Schedule`.
  - If you select **Off site**, a task is created displaying a unique asset task number with the task type as **Ship** after you refresh the list. The **Stage** field of the RMA response order line is set to `Ship`.
  - If you select **Denied**, the RMA response order line is set to **Closed Complete**. If there are no more open RMA response order lines, then the RMA response order is closed.
- The **State** field of the RMA assessment task is set to **Closed Complete**.

What to do next

Schedule a visit to the customer site or Ship the asset to the DaaS provider

Schedule a visit to the customer site

Schedule a visit of the DaaS provider representative to the customer location.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select an RMA order number.
5. Select the **RMA response order lines** tab.
6. Select the asset task number with the Task type as **Schedule**.
7. On the form, fill in the fields.

Schedule task form

Field	Description
Number	Unique number for the Schedule task.
Asset order line	The RMA response order line number associated with this task.
Due date	Estimated date of completing this task.
Scheduled date	The scheduled date for the DaaS provider representative to visit the customer's location.
Task name	Name of the current task. This field is automatically set to `Schedule`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
State	Status of the Schedule task. This field is automatically set to Open.
Assignment group	The assignment group for the individual who is responsible for working on the Schedule task.
Assigned to	The individual responsible for working on the Schedule task.
Asset	The asset that is selected while creating an RMA response order line. For more information, see Create an RMA response order line.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

8. Select **Close Task**.

Result

- After the Schedule task is completed and you refresh the list, a task is created displaying a unique asset task number with the task type as **Evaluate RMA asset**.
- The **State** field of the Schedule task is set to **Closed Complete**.
- The **Stage** field of the Inbound asset order line is set to **Evaluation**.

What to do next

Evaluate the RMA asset

Evaluate the RMA asset

Evaluate the Return Merchandise Authorization (RMA) asset on the scheduled date at the customer location.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select an RMA order number.
5. Select the **RMA response order lines** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select the asset task number with the Task type as **Evaluate RMA asset**.
7. On the form, fill in the fields.

Evaluate RMA asset form

Field	Description
Number	Unique number for the Evaluate RMA asset task.
Asset order line	The RMA response order line number associated with this task.
Due date	Estimated date of completing this task.
State	Status of the Evaluate RMA asset task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working on the Evaluate RMA asset task.
Evaluation result	○ **Repairable**: The asset can be repaired. ○ **Replace**: The asset can't be repaired and the old asset would be returned to the DaaS provider. A new inbound asset order would get created for requesting a new asset with the same model.
Task name	Name of the current task. This field is automatically set to `Evaluate RMA asset`.
Assigned to	The individual responsible for working on the Evaluate RMA asset task.
Asset	The asset that is selected while creating an RMA response order line. For more information, see Create an RMA response order line.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

8. Select **Close Task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The result of the task completion changes according to the value selected in the **Evaluation result** field:
  - If you select **Repairable**, a task is created displaying a unique asset task number with the task type as **Repair asset** after you refresh the list. The **Stage** field of the RMA response order line is set to **Repair**.
  - If you select **Replace**, a task is created displaying a unique asset task number with the task type as **Ship** after you refresh the list. The **Stage** field of the RMA response order line is set to **Inbound shipment**. A new inbound asset order is created.
- The **State** field of the Evaluate RMA asset task is set to **Closed Complete**.

What to do next

Repair the RMA asset or Ship the asset to the DaaS provider

Repair the RMA asset

Indicate whether the Return Merchandise Authorization (RMA) asset has been repaired or considered unrepairable.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select an RMA order number.
5. Select the **RMA response order lines** tab.
6. Select the asset task number with the Task type as **Repair asset**.
7. On the form, fill in the fields.

Repair asset form

Field	Description
Number	Unique number for the Repair asset task.
Asset order line	The RMA response order line number associated with this task.
State	Status of the Repair asset task. This field is automatically set to Open.
Assignment group	The assignment group for the individual who is responsible for working on the Repair asset task.
Task name	Name of the current task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	This field is automatically set to `Repair asset`.
Stockroom	This field is automatically populated with the stockroom details that you provided in the Receive task. For more information, see Receive asset. **Note:** This field doesn't include any information for the On-site assessment flow. For more information about selecting the assessment action, see Assess the RMA asset.
Due date	Estimated date of completing this task.
Assigned to	The individual responsible for working on the Repair asset task.
Repair result	Indication of whether the Return Merchandise Authorization (RMA) asset has been repaired or considered unrepairable. ○ Repaired ○ Unrepairable
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

8. Select **Close Task**.

Result

- The result of the task completion changes according to the value selected in the **Repair result** field:
  - If you select **Repaired**, a task is created displaying a unique asset task number with the task type as **Evaluate asset** after you refresh the list. The **Stage** field of the RMA response order line is set to **Quality check**.
  - If you select **Unrepairable**, a task is created displaying a unique asset task number with the task type as **Ship** after you refresh the list. The **Stage** field of the RMA response order line is set to **Inbound shipment**. A new inbound asset order is created.
- The **State** field of the Repair asset task is set to **Closed Complete**.

What to do next

Evaluate the repaired asset or Ship the asset to the DaaS provider

Evaluate the repaired asset

Evaluate the status of the repaired asset and indicate the evaluation result as redeployable or identified for disposal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select an RMA order number.
5. Select the **RMA response order lines** tab.
6. Select the asset task number with the Task type as **Evaluate asset**.
7. On the form, fill in the fields.

Evaluate asset form

Field	Description
Number	Unique number for the Evaluate asset task.
Asset order line	The RMA response order line number associated with this task.
State	Status of the Evaluate asset task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working on the Evaluate asset task.
Evaluation result	Indication of whether the asset has to be redeployed or disposed. ○ **Redeployable**: The asset is functioning properly. ○ **To be disposed**: The asset didn't pass certain quality checks and can't be returned to the customer.
Task name	Name of the current task. This field is automatically set to `Evaluate asset`.
Stockroom	This field is automatically populated with the stockroom details that you provided in the Receive task. For more information, see Receive asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This field doesn't include any information for the On-site assessment flow. For more information about selecting the assessment action, see Assess the RMA asset.
Due date	Estimated date of completing this task.
Assigned to	The individual responsible for working on the Repair asset task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

8. Select **Close Task**.

Result

The result of the task completion changes according to the value selected in the **Evaluation result** field:

- If you select **Redeployable**, the **State** field of the Evaluate task is set to **Closed Complete**. The **Stage** field of the RMA response order line is set to **Completed**.
- If you select **To be disposed**, a task is created displaying a unique asset task number with the task type as **Ship** after you refresh the list. The **Stage** field of the RMA response order line is set to **Inbound shipment**. A new inbound asset order is created.

What to do next

Ship the asset to the DaaS provider

Ship the asset to the DaaS provider

Return the asset to the DaaS provider and record the shipment details using the Ship task.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select an RMA order number.
5. Select the **RMA response order lines** tab.
6. Select the asset task number with the Task type as **Ship**.
7. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Task Details form

Field	Description
Number	Unique number for the Ship task.
Asset order line	The inbound asset order line number associated with this task.
Due date	Estimated date of completing this task.
Asset	The asset that is selected while creating the associated RMA response order line. For more information, see Create an RMA response order line.
Shipping carrier	Organization that's responsible for shipping the assets to the DaaS provider. For example, FedEx.
Ship from	The origin location for shipping the assets.
Ship date	The shipment date for delivering the assets to the DaaS provider.
Task name	Name of the current task. This field is automatically set to `Ship`.
State	Status of the Ship task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working the Ship task.
Assigned to	The individual responsible for working on the Ship task.
Tracking number	Tracking number or reference number of the shipment of the asset.
Ship to	Destination for the asset shipment.
Shipment order	Reference to the shipment record created in the Shipment [sn_itam_common_shipment] table. This field is automatically populated when the Ship task is closed.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

8. Select **Close Task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- After the Ship task is completed and you refresh the list, a task is created displaying a unique asset task number with the task type as **Receive asset**.
- The **Shipment assets** tab is displayed, which includes the shipment information.
- The **State** field of the Ship task is set to **Closed Complete**.
- The **Stage** field of the RMA response order line is set to **Receive**.

What to do next

Receive asset

Receive asset

After the shipment of the asset to the DaaS provider is complete, confirm the receipt of the asset by using the Receive task.

Before you begin

Role required: sn_daas_ham.daas_asset_manager or inventory_user

- Install the Hardware Asset Management for DaaS application from ServiceNow Store.
- Install the Hardware Asset Management application from ServiceNow Store.

Procedure

1. Navigate to **Workspaces** > **Hardware Asset Workspace**.
2. Select the **DaaS provider** view.
3. Select the **RMA orders** tab.
4. Select an RMA order number.
5. Select the **RMA response order lines** tab.
6. Select the asset task number with the Task type as **Receive asset**.
7. On the form, fill in the fields.

Receive asset form

Field	Description
Number	Unique number for the Receive asset task.
Asset order line	The RMA response order line number associated with this task.
Due date	Estimated date of completing this task.
Asset	The asset that is selected while creating the associated RMA response order line. For more information, see Create an RMA response order line.
Asset received	Option to confirm the receipt of the asset. Values:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ **Yes**: The asset is received by the DaaS provider. ○ **No**: The asset isn't received by the DaaS provider. **Note:** You must select **Yes** to close this task.
Task name	Name of the current task. This field is automatically set to `Receive confirmation`.
State	Status of the Receive task. This field is automatically set to `Open`.
Assignment group	The assignment group for the individual who is responsible for working the Receive confirmation task.
Assigned to	The individual responsible for working on the Receive task.
Stockroom	Brief description of the task.
Short description	Detailed description of the task.
Description	Notes about the task that are visible to all users within your organization.
Work notes	Unique number for the Receive task.

8. Select **Close Task**.

Result

- The result of the task completion changes according to the value selected in the **Asset received** field:
  - If you select **Yes** for an on-site assessment of your asset, the **State** field of the Receive task is set to **Closed Complete**. The **Stage** field of the Inbound asset order line is set to **Completed**. The **State** field of the Inbound asset order is set to **Closed Complete**.
  - If you select **Yes** for an off-site assessment of your asset, a task is created displaying a unique asset task number with the task type as **Evaluate RMA asset** after you refresh the list. The **Stage** field of the Inbound asset order line is set to **Evaluation**.
- The **State** field of the Receive asset task is set to **Closed Complete**.

What to do next

Evaluate the RMA asset

DaaS reference

Reference topics provide additional information about the lists and forms that you use to configure and administer Asset as a Service.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Components installed with Hardware Asset Management for DaaS

Several types of components are installed with activation of the Hardware Asset Management for DaaS (com.sn_daas_ham) plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
DaaS Manager [sn_daas_ham.daas_asset_manager]	• Manages all aspects of DaaS, including access and execution of important actions, reports, and requests such as inbound asset orders and Return Merchandise Authorization (RMA) orders. • Marks assets as DaaS assets.	Asset Manager [asset]

Tables installed

Table	Description
RMA response [sn_daas_common_rma_response_order]	Information about the Return Merchandise Authorization (RMA) request with multiple order lines, including details, such as the originating account and the delivery address.
RMA response order line [sn_daas_common_rma_response_orderline]	Model and asset information associated with the RMA creation.
Inbound asset order [sn_itam_common_inbound_asset_order]	Information about the asset request with multiple order lines, such as the originating account and the delivery address.
Inbound asset order line [sn_itam_common_inbound_asset_orderline]	Information about the model for which the asset is requested.

Cloud Cost Management

ServiceNow® Cloud Cost Management application (formerly Cloud Insights) gives you visibility and control of your cloud usage and costs. It helps you discover all your cloud resources, break down cloud spend by cost center, business service, and other entities. You also get recommendations on how to reduce cloud spend and automate repetitive cost optimization tasks.

Watch this short video for an introduction to the Cloud Cost Management application.

Introduction to the Cloud Cost Management application.

Cloud Cost Management gives you visibility and control over your cloud spending with these capabilities:

- Discover all cloud resources across your environment
- Analyze cloud costs by cost center, business service, and custom entity

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Receive recommendations to reduce unnecessary spending
- Automate repetitive cost optimization tasks

For complete visibility into both cloud and software license spending, use Cloud Cost Management alongside Software Asset Management. For further details, see Software Asset Management.

Use the Asset Management Executive dashboard to track critical performance indicators for Cloud Cost Management across a unified view. For further details, see Visibility into Cloud Cost Management KPIs using the Asset Management Executive Dashboard.

Important: Cloud Cost Management 8.0.0 and earlier versions are in the Planned Deprecation phase (see Deprecation Process for more details). These versions won't be available on the ServiceNow Store for download and installation for new deployments, but continue to be supported for existing deployments.

Explore	Configure	Use
Learn the key features and business value that the Cloud Cost Management application offers.	Activate Cloud Cost Management supporting plugins, features, and assign roles to enable additional setup activities.	Automate and streamline manual processes by automating cloud tasks.

Cloud Cost Management Infra Stack	Reference
Learn the key features and business value that the Cloud Cost Management Infra Stack application offers.	Get details about the roles, domain separation, and service categories in Cloud Cost Management.

Learn

What is cloud cost management (CCM)?

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Troubleshoot and get help

- Ask or answer questions in the Cloud Cost Management ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Cloud Cost Management

Learn more about Cloud Cost Management with a sample workflow and reviewing the benefits that it can provide for different users in your organization.

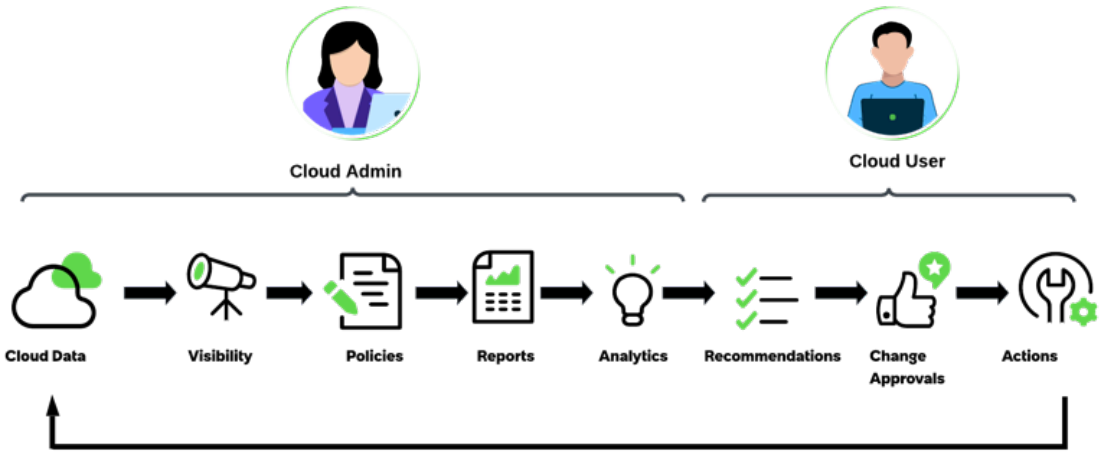
Cloud Cost Management overview

Cloud Cost Management helps you analyze the full range of costs related with cloud assets so you can identify and act on chances to save money and optimize operations.

Cloud Cost Management workflow

Cloud Cost Management continuously monitors your cloud infrastructure to analyze costs so you can identify and act on resources to save money and optimize operations.

Monitor your cloud infrastructure



Cloud Cost Management benefits

Benefit	Feature	Users
Optimize cloud costs and usage by gaining complete visibility of your cloud spend and usage through an intuitive and streamlined user interface.	Cloud Cost Management Workspace	Executives/FinOps Practitioners/Cloud Managers/Cloud Administrators
Rightsize cloud resources by getting automated recommendations on how to reduce cloud costs by correctly dimensioning cloud resources to match usage.	Rightsizing resources	Cloud Administrators/ Application owners
Decrease costs by the conversion of on-demand payment plans to reservation plans for your cloud resources.	Commitments	Cloud Administrators/ Application owners

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Benefit	Feature	Users
Identify cost optimizations targets by analyzing areas of high spend and stranded cloud assets.	Unused resources	Cloud Administrators/ Application owners
Turn off resources when not in use by identifying cloud resources that aren't used outside normal working hours and automatically turn them off and on.	Business hours	Cloud Administrators/ Application owners
Allocate budgets	Cloud budgets	FinOps Practitioners/ Cloud Administrators
Automate optimization approvals by integrating cloud optimization tasks into your existing change management processes.	Change Management	FinOps Practitioners/ Cloud Administrators

AI in Cloud Cost Management

Set up, manage, and optimize your generative AI solutions on the ServiceNow AI Platform® from a single workspace.

The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

For more information, see ServiceNow product tiers.

For more information about AI capabilities in Cloud Cost Management, see Analyze cloud spend using the Cloud cost summarizer generative AI skill.

For information about AI assets that are available on the ServiceNow AI Platform, see the following topics:

- Generative AI skills
- Agentic workflows

Supporting information for ServiceNow Otto for Cloud Cost Management (CCM)

Get a quick overview of the important information related to the ServiceNow Otto for Cloud Cost Management application.

Supported versions

The ServiceNow Otto for CCM application is supported starting with the Australia Patch 5 release.

Supported user interfaces

You can access the generative AI skill included in the ServiceNow Otto for CCM application through the ServiceNow Otto panel in the Cloud Cost Management Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Application information

Activate the ServiceNow Otto for Cloud Cost Management (CCM) (com.sn_now_assist_ccm) store application to use the generative AI skill.

This store application has the following dependencies:

- Cloud Cost Management (sn_clin)
- Cloud Spend Core (sn_cld_spend_core)
- Cloud Integrations Core (sn_cld_intg_core)
- ServiceNow Otto for Platform (com.sn_genai_platform)
- AI Agents for IT Asset Management (com.sn_itam_aia)

Activate the applications in the following order:

- Cloud Cost Management (sn_clin)
- Cloud Spend Core (sn_cld_spend_core)
- Cloud Integrations Core (sn_cld_intg_core)
- ServiceNow Otto for Platform (com.sn_genai_platform)
- ServiceNow Otto for Cloud Cost Management (com.sn_now_assist_ccm)

Using generative AI skills for ServiceNow Otto for Cloud Cost Management (CCM)

Streamline cloud spend management tasks in the Cloud Cost Management Workspace by using the generative AI skills available in the ServiceNow Otto for Cloud Cost Management application.

Available generative AI skills for ServiceNow Otto for Cloud Cost Management

Generative AI skill name	Description	Version information
Cloud cost summarizer	Generates a comprehensive summary of spend trends for all the cloud service providers, top cost drivers, budget comparisons, and optimization recommendations.	Introduced in ServiceNow Otto for Cloud Cost Management (CCM) version 11.0.

Cloud Cost Management Infra Stack

Use the Cloud Cost Management Infra Stack application to process and download billing files with improved data processing speed. The Cloud Cost Management Infra Stack application also supports high transaction volumes.

Overview of the Cloud Cost Management Infra Stack application

The Cloud Cost Management Infra Stack application is an optional plugin that can be installed alongside Cloud Cost Management version 8.1 and later from the ServiceNow Store. Installing this plugin also activates the Glide Fenix (com.glide.fenix) plugin.

Important: If you have activated the Cloud Cost Management Infra Stack application, you can't deactivate it later.

Provider-specific credential aliases are installed by default with the Cloud Cost Management Infra Stack application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Provider	Credential alias
AWS	ccm_aws_alias
Microsoft Azure	ccm_azure_alias
Google Cloud	ccm_google_alias

For the billing download job to complete successfully, you should map the alias that's applicable to your cloud provider with the corresponding credentials.

Benefits of the Cloud Cost Management Infra Stack application

The Cloud Cost Management Infra Stack application offers several key benefits for more efficient and effective cloud cost management. These benefits enable organizations to optimize their cloud resources and reduce overall costs.

Improved data processing speed

The application significantly improves data processing speed, which enables faster processing and analysis of billing files.

Support for high transaction volumes

It's designed to handle high transaction volumes efficiently, making it suitable for large-scale cloud environments.

Enhanced performance with Kubernetes

The application uses a cost-aware Kubernetes cluster that helps it process billing data with cost efficiency and manage complex cloud infrastructures effectively.

Better cloud cost management

By providing frequent insights and faster data processing, the Cloud Cost Management Infra Stack application enables organizations to manage their cloud costs effectively and make informed decisions.

Requirements for processing billing jobs using the Cloud Cost Management Infra Stack application

The framework of the Cloud Cost Management Infra Stack application enables parallel processing of billing files, resulting in faster processing of large files. The application processes billing jobs using a Kubernetes cluster that's outside Cloud Cost Management Glide but within ServiceNow datacenters.

You must fulfill these requirements to process billing jobs.

- Map all the provider-specific credentials of your billing download jobs to the corresponding credential alias. For example, if you have two AWS credentials, map them to ccm_aws_alias so that the billing download job completes successfully. For more details on mapping credentials to aliases, see Credential aliases for Discovery.

  Note: If you're upgrading from an earlier version to Cloud Cost Management version 10.0 and have installed the Cloud Cost Management Infra Stack application, the mapping of credentials to alias happens automatically for all active billing download jobs. However, for any new job, you should do the mapping manually.

- Make sure to have enough storage on your Cloud Cost Management Glide database for storing the attachments of the AWS billing job with Assume role authentication temporarily until the billing download job is processed. After the job is complete, these temporary attachments

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

are deleted from the Glide database. The storage that you should have depends on the size of data on AWS. For more details, see Processing AWS billing jobs with Assume role authentication.

Cloud Cost Management Workspace

Use the Cloud Cost Management Workspace, the intuitive and streamlined user interface of the Cloud Cost Management application, to analyze the full range of costs that are associated with cloud resources. You can identify and act on opportunities to save money and optimize operations.

The Cloud Cost Management Workspace is a unified medium with multiple views. The views help you analyze costs, spend, budget of your cloud resources, and provide insight into how IT supports business application and services through various dashboards.

Note: You can view the reports and data based on your role. For more information, see Cloud Cost Management roles.

The Cloud Cost Management Workspace contains the following views:

- Cloud cost overview: Use the Cloud Cost Management Workspace through this simplified overview page and get insights into your cloud resources.
- Spend view: Analyze and understand the spend on your cloud resources using spend analytics.
- Optimization view: View your total savings by recommendation type and the number of recommendations to review, which are grouped by their state.
- Budget view: Reduce cloud spend by proactively understanding the budget compliance of your cloud resources.
- Business Insights view: Calculate and view the total cost of ownership (TCO) for your business applications by combining cloud spend with non-cloud costs such as hardware, software licensing, and labor.
- Operations view: View and manage your preferences, cost usage tags, and admin-related operations.
- Admin view: Install, set up, and configure Cloud Cost Management through a guided experience.

Cloud cost overview

Enhance your experience by using the modernized and user-friendly Cloud Cost Management overview. This overview page helps you use the Cloud Cost Management application more effectively by reducing complexity.

Important: If you have the insights_owner role, only the accounts that are assigned to you appear in the filters and data.

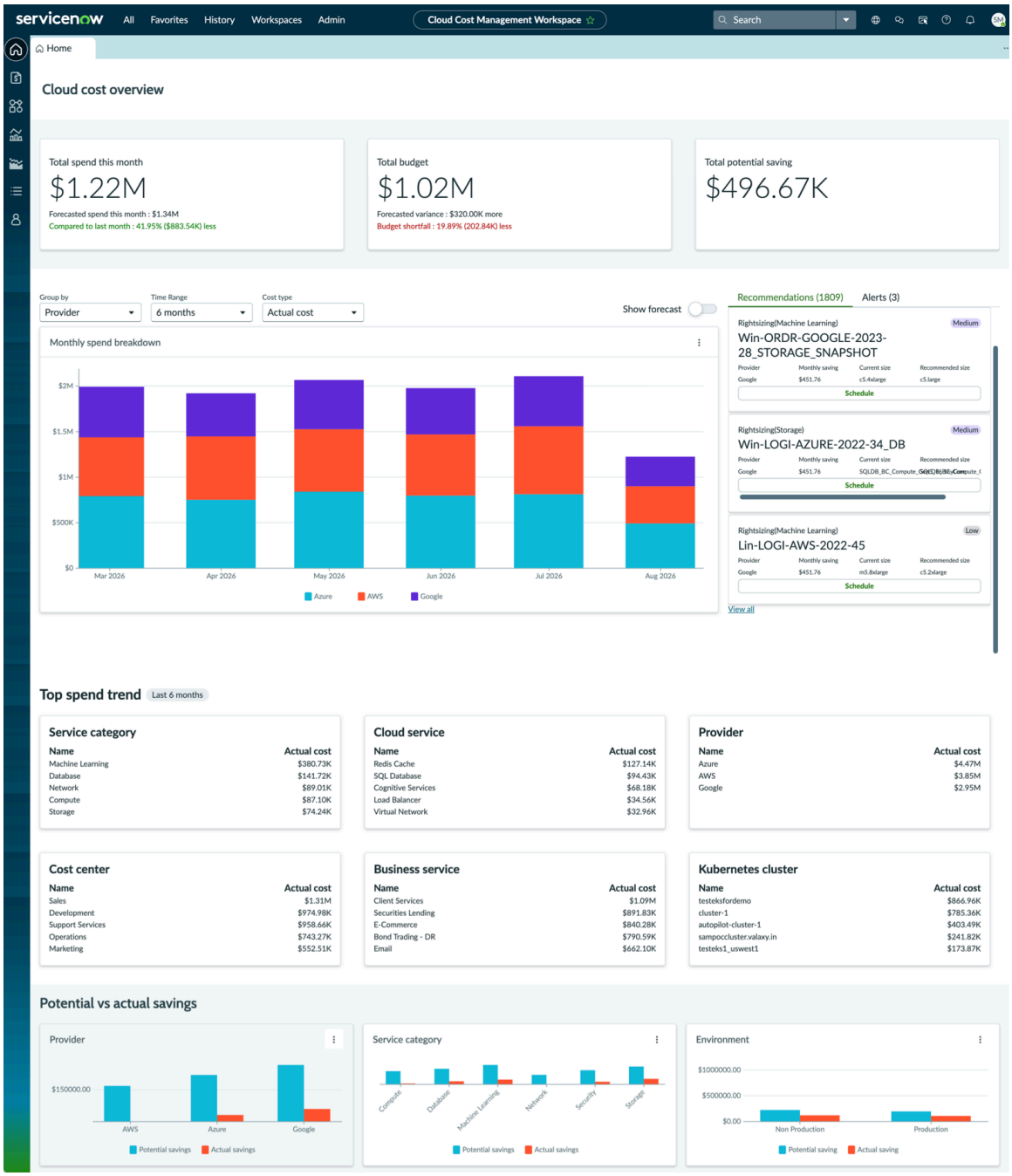
Use the Cloud Cost Management overview to,

- Understand how you currently spend on cloud resources or service accounts for the last 30 days.
- Gain insights into key metrics such as the total budget and potential savings for your cloud resources.
- Analyze your spend breakdown and group your results by provider, service category, service account, cloud service, or purchase option. Refine your results by selecting a time range of 3, 6, 9, or 12 months, choosing actual or amortized cost, and toggling forecast cost on or off.

Note: You can view the forecast grouped only by provider or service account.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Make smarter cloud cost decisions with AI-powered summarization of cloud spend reports.
- View cloud spending analytics based on provider, service category, and cloud service.
- Get information about the top spend trends that are grouped by service category, cloud service, cost center, business service, and provider.
- Understand your savings breakdown by viewing your potential and actual saving.
- Get actionable insights into your cloud resources through alerts and recommendations.



Cloud Cost Management Workspace metrics

Report	Description
Total spend this month	Actual spend on your service accounts or cloud resources for the month. Selecting this

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cloud Cost Management Workspace metrics (continued)

Report	Description
	card navigates you to the Spend dashboard. For more information, see Spend view. The **Forecasted spend this month** amount displays the total future spends for all your cloud assets. The **Compared to last month** percentage amount shows the spend difference of the current month and last month.
Total budget	Total budget of your service accounts or cloud assets where the current date falls between the start date and end date of the budget. Selecting this card navigates you to the Budget view. For more information, see Budget view. For a budget owner, the budget for only the created policies is displayed. The **Forecasted variance** amount shows the budget amount based on the spend on your cloud resources, which is `Forecasted spend this month - Total budget.`
Total potential saving	Total saving for your cloud assets based on all the recommendations that you haven't acted on. Selecting this card navigates you to the Optimization view. For more information, see Optimization view.
Monthly spend breakdown	Monthly spend breakdown grouped by provider, service category, service account, cloud service, or purchase option. The results can be sorted by time range and cost type. Use the **Show forecast** toggle switch for hiding or showing the future cost. Selecting the **Summarize** button generates an AI-assisted summary of your cloud spend trends, top cost drivers, and budget alignment with your selected filters and groupings. Selecting a monthly spend breakdown bar navigates you to the Spend analytics page. The filters that you apply to the Monthly spend breakdown get applied to the Spend analytics page. For more information, see Spend analytics.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Top spend trend

Report	Description
Top spend trend	Spend trend or actual cost grouped by service category, cloud service, provider, cost center, business service, and Kubernetes cluster. Selecting a Top spend trend card navigates you to the Spend analytics page. For more information, see Spend analytics.

Potential vs actual savings

Report	Description
Potential vs actual savings grouped by Provider, Service category, and Environment	Potential vs actual savings grouped by provider, service category, and environment. **Note:** To view the Potential vs actual savings grouped by environment chart, you must create tag categories as Production and Non Production. For more information about creating a tag category, see Create and update a tag category. • **Potential savings**: Indicates the total spend on your cloud resources that could be optimized by the recommendations. • **Actual savings**: Indicates the total savings achieved by following the recommendations to optimize your cloud resources. Selecting a potential or actual savings bar navigates you to the Optimization view. For more information, see Optimization view.

Note: The alerts that you view on the Cloud Cost Management Overview page are for the last one week.

Alerts

Alert	Description
Last <provider> billing download job failed	The billing download job that downloads, organizes, and stores billing data for your payer account has failed.
Last <provider> price sheet download job failed	The price sheet download job that downloads and stores price sheet data for your cloud provider has failed.
Scheduled jobs failed	One or more scheduled jobs, which automate processes for cloud providers have failed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Alerts (continued)

Alert	Description
<Number> declined recommendations	Number of recommendations that you have declined, which indicates potential savings.
<Number> failed recommendations	Number of recommendations that have failed, which indicates potential savings for your cloud resources.

Recommendations

Recommendation	Description
All	Displays all the recommendations that Cloud Cost Management provides for your cloud assets.
Business hour	The Business hour recommendation helps you identify resources that are running when they should be powered off.
Commitments	The Commitments recommendation helps you identify resources that would save you money with reservation plans or saving plans. You can accept or decline the recommendation.
Rightsizing	The Rightsizing recommendation helps you identify the users, user groups, or locations that are wasting money by running over-provisioned or underused resources. You can schedule the rightsizing processes and specify the amount of potential rightsizing savings that triggers notifications.
Unused	The Unused recommendation helps you identify the unused resources. You can schedule unused machines to be powered off or terminated.

Spend view

Ensure accurate spend reporting by using the Spend view in the Cloud Cost Management Workspace.

Important: If you have the insights_owner role, only the accounts that are assigned to you appear in the filters and data.

Use the Spend dashboard to analyze and understand the spend on your assets that are grouped by various categories:

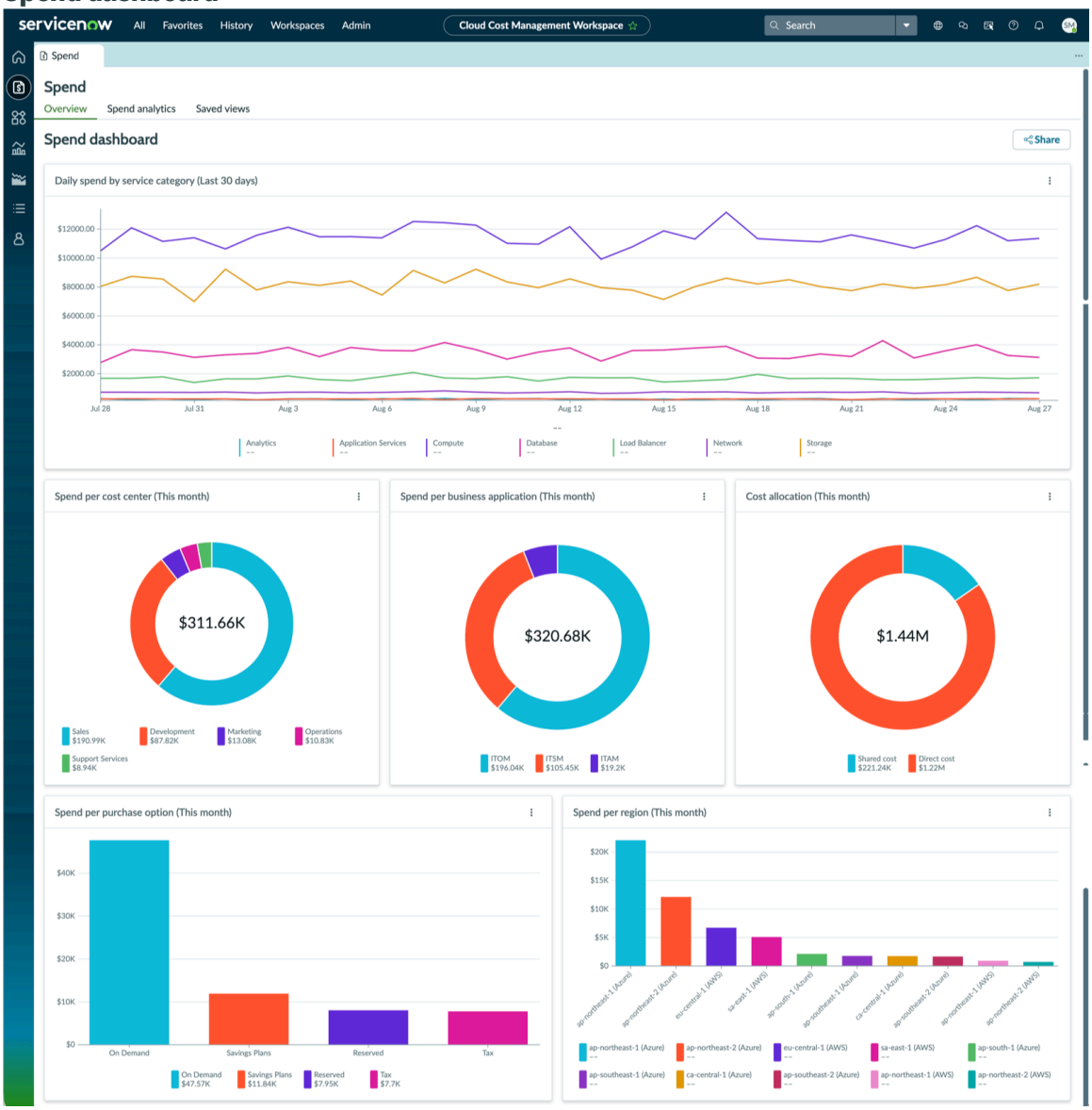
- Daily spend by service category (Last 30 days)
- Spend per cost center (This month)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Spend per purchase option (This month)
- Spend per business application (This month)
- Cost allocation (This month)
- Spend per region (This month)

The Spend dashboard displays detailed reports for the listed categories. Select a report to view the cloud resource spend and fields in the list view. For more information on these reports, see Spend dashboard. Access the Spend view by navigating to **Workspaces** > **Cloud Cost Management Workspace** > **Spend**.

Spend dashboard



Spend dashboard

Report	Source	Description
Daily spend by service category (Last 30 days)	Spend Report Daily Aggregated Cost [sn_cld_spend_core_daily_aggregated_cost]	Service category-wise daily spend on cloud resources. Selecting a report navigates

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Spend dashboard (continued)

Report	Source	Description
		you to the record details in a list view.
Spend per cost center (This month)	Spend Report Monthly Cost [sn_cld_spend_core_monthly_aggregated_cost]	Cost center-wise spend on cloud resources for the current month. Selecting a report navigates you to the record details in a list view.
Spend per purchase option (This month)	Spend Report Monthly Cost [sn_cld_spend_core_monthly_aggregated_cost]	Purchase option-wise spend on cloud resources for the current month. Selecting a report navigates you to the record details in a list view.
Spend per business application (This month)	Spend Report Monthly Cost [sn_cld_spend_core_monthly_aggregated_cost]	Business application-wise spend on cloud resources for the current month. Selecting a report navigates you to the record details in a list view.
Cost allocation	This report fetches data from the Spend analytics dashboard.	Cost allocated for cloud resources including direct cost and shared cost. Selecting a report navigates you to the record details in a list view.
Spend per region (This month)	Spend Report Monthly Cost [sn_cld_spend_core_monthly_aggregated_cost]	Region-wise spend on cloud resources for the current month. Selecting a report navigates you to the record details in a list view.

Spend analytics

The Spend analytics page gives you visibility of your cloud spending data across multiple report types, including cloud spend, Kubernetes spend, and shared cost. Use saved views to store and reload your preferred filter configurations, including cost type, time range, and group-by selections.

Important: If you have the Insights owner (insights_owner) role, only the accounts that are assigned to you appear in the filters and data.

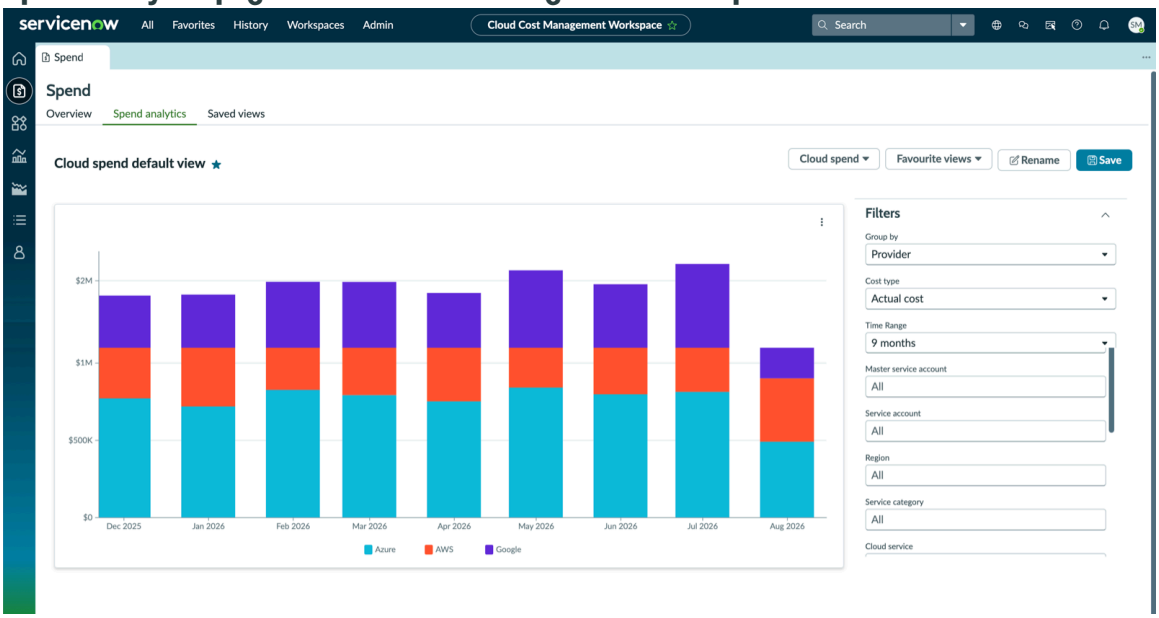
Selecting any bar on the spend report navigates you to the list view of the corresponding report. The following roles can perform actions on spend views:

- Spend admin (spend_admin) and Spend owner (spend_owner): can create, update, share, favorite, and delete views. These roles can also modify the system property sn_cld_spend_core.favourite_views_limit.
- Spend user (spend_user): can create, update, favorite, and delete their own views. This role can read but not modify the system property sn_cld_spend_core.favourite_views_limit.

Access the Spend analytics page by navigating to **Workspaces** > **Cloud Cost Management Workspace** > **Spend** > **Spend analytics**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Spend analytics page on Cloud Cost Management Workspace



Perform the following actions on the Spend analytics page.

Button or icon	Action
Star (outline)	Marks a spend view as a favorite. The star (outline) icon ☆ appears next to each saved view on the Spend Analytics page.
Star (solid)	Indicates that the current view is marked as a favorite. Select the Star (solid) icon ★ again to remove it from your favorites list.
Spend report type	Displays the available spend report types: • Cloud spend • Kubernetes spend • Shared cost
Favorite views	Shows the list of views that are marked as favorite by selecting the star icon. The list shows the view names based on the report type selected from the spend report type drop-down list. If cloud spend is selected only for Cloud spend, the favorites will show up in the list.
Set as default	Sets a spend report as your default view on the Spend analytics page.
Rename	Renames the spend report.
Delete	Deletes the spend report.
Save	Saves a spend report with a preferred view name and lets you choose who can view the report. Available values are:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Button or icon	Action
	• Public: The view is visible to all users. • Me: The view is visible only to you. This is the default selection. • Group: The view is visible to members of the groups you select in the **Groups** field.
Save as	Creates a new spend view based on the selected filters. Use this action to duplicate and rename an existing view without overwriting it.

Apply any of the following filters to a spend report to view precise results. The filters that you apply on the Spend analytics page also get applied to the list view of the report.

Filters on spend report

Filter	Description
Group by	Groups the spend report by the following available options: • Provider • Purchase option • Region • Service account • Service category • Cloud service • Resource group • Tag category
Cost type	• **Actual cost**: Each billing period, your organization pays for direct cloud services. • **Amortized cost**: Your organization pays the effective cost of the upfront and monthly reservation fees spread across the billing period. The amortized cost type is described in detail on the provider site.
Time range	Sorts your spend results by the current month or a time range such as 3, 6, 9, or 12 months.
Additional filters	Narrows down spend data using the following specific scopes: • Provider • Master Service Account • Service account • Region

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Filters on spend report (continued)

Filter	Description
	• Service category • Cloud service • Purchase option • Resource group • Tag category **Note:** For more information about tag categories and the list of default tag categories, see Cost usage tags and List of default tag categories. • Tag values • Tag categories selected

Related topics

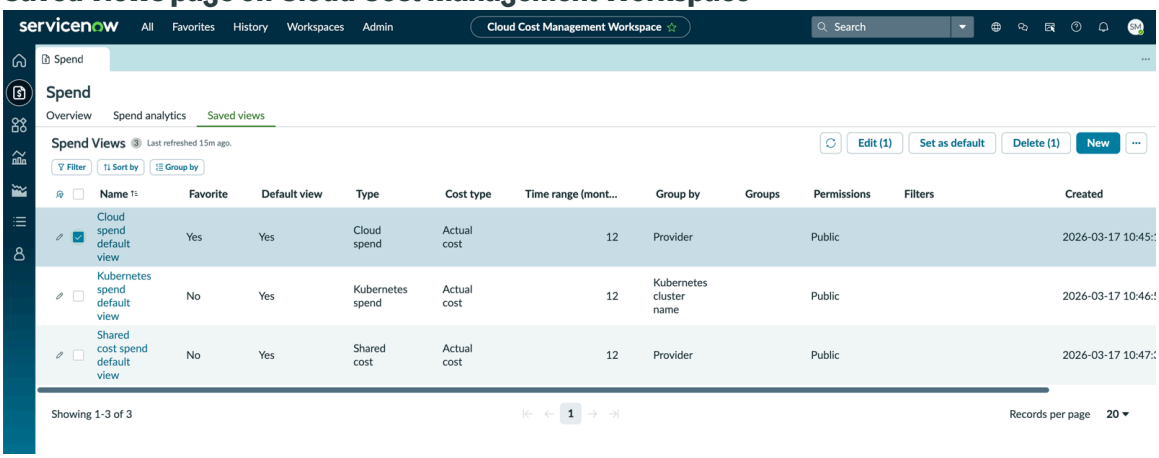
- Cloud service categories in Cloud Cost Management
- Cost usage tags
- Create and update a tag category
- Create or update a shared cost allocation policy

Saved views

The Saved views page displays all spend analytics views saved for your organization. Use this page to manage your customized views.

The Saved views page shows configuration details for each spend view, including the spend type, cost type, time range, group-by selection, permissions, and the date it was created. Access the Saved views page by navigating to **Workspaces** > **Cloud Cost Management Workspace** > **Spend** > **Saved views**.

Saved views page on Cloud Cost Management Workspace



Perform the following actions on the Saved views page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Button	Action
New	Creates a new spend analytics view with the configured spend type, cost type, time range, group-by options, and permissions.
Edit	Updates the selected view according to your input. Select a view from the list to edit it.
Set as default	Sets the selected view as your default view on the Spend analytics page. The default view loads automatically when you open the Spend analytics page. Select a view from the list to set as default.
Delete	Deletes the selected view. Default views can't be deleted.

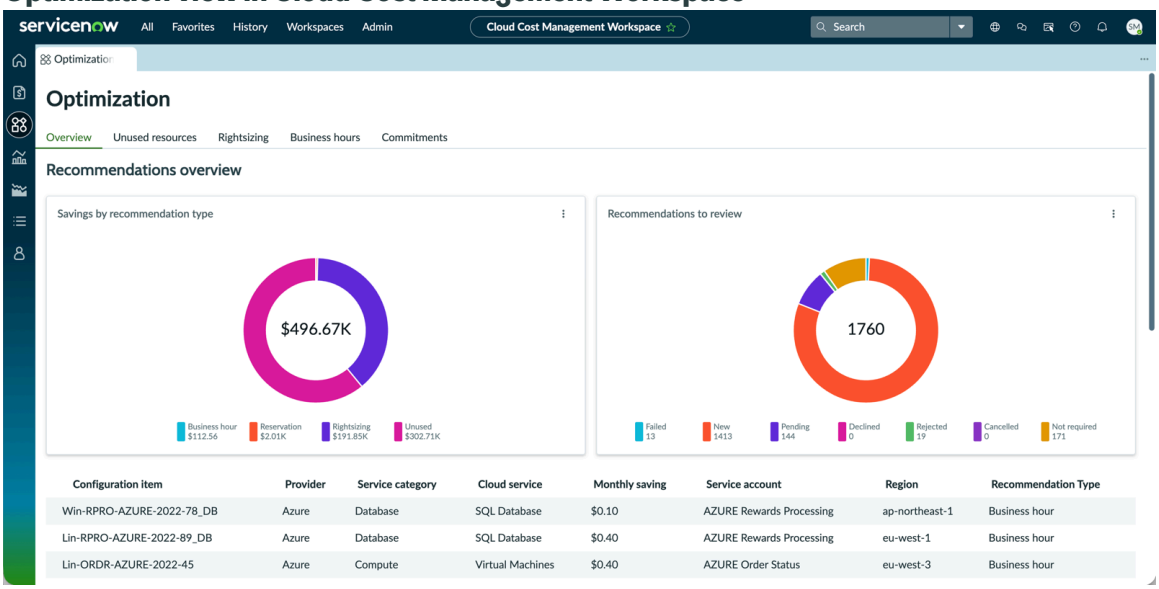
Optimization view

Use the Optimization view in the Cloud Cost Management Workspace to review savings opportunities and act on recommendations across Unused resources, Rightsizing, Business hours, and Commitments.

Important: Starting with Cloud Cost Management version 11.0, if you have the insights_user role, you get read-only access to recommendation type data such as Rightsizing, Unused resources, Commitments, and Business hours.

Access the Optimization view by navigating to **Workspaces** > *Cloud Cost Management Workspace* > **Optimization**.

Optimization view in Cloud Cost Management Workspace



The Optimization view includes the following categories of operations:

- **Overview**: View your total savings by recommendation type and the number of recommendations to review, which are grouped by their state.
- **Unused resources**: View the total potential savings by service category, total potential savings by change group, number of unused resources that are scheduled, completed, declined, failed, and excluded. You can also exclude or schedule unused resources to identify resources

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

that are wasting money because they aren't used, configure the unused settings, and create unused recommendations. For more information, see Manage unused resources.

- **Rightsizing**: View the total potential savings by service category, total potential savings by change group, number of resources that are scheduled, completed, declined, failed, and excluded for rightsizing. You can also exclude or schedule resources for rightsizing resources, configure the rightsize settings, and create service category metrics. For more information, see Resize resources with Rightsizing.
- **Business hours**: View the total potential savings by service category and change group, and compare business hour spend against non-business hour spend. Track the number of resources that are scheduled, completed, declined, failed, and excluded from business hour policies. For more information, see Improve resource usage with Business hours.
- **Commitments**: View upfront cost to reserve, breakdown by resource type, and potential savings by service category. You can accept or decline the recommendations for reserved instances. For more information, see Reduce resource cost with Commitments.

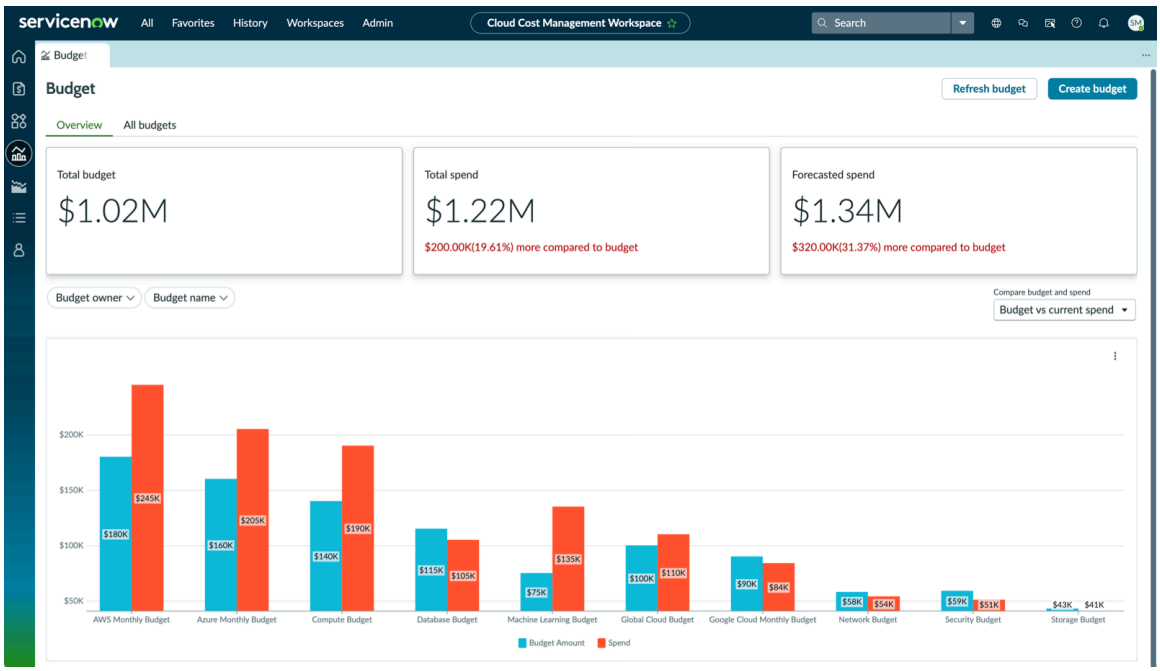
Budget view

Understand budget compliance by groups and service accounts can significantly improve oversight and reduce cloud spend.

> **Important:** If you have the insights_owner role, only the accounts that are assigned to you appear in the filters and data.

Use the Budget view to:

- View your total budget and spend on your cloud assets.
- Analyze your future spend and understand if you're within or over the budget.
- Manage your cloud spend, you can define and monitor custom Budget plans.
- Create and manage a budget policy. For more information, see Create or update a budget policy.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

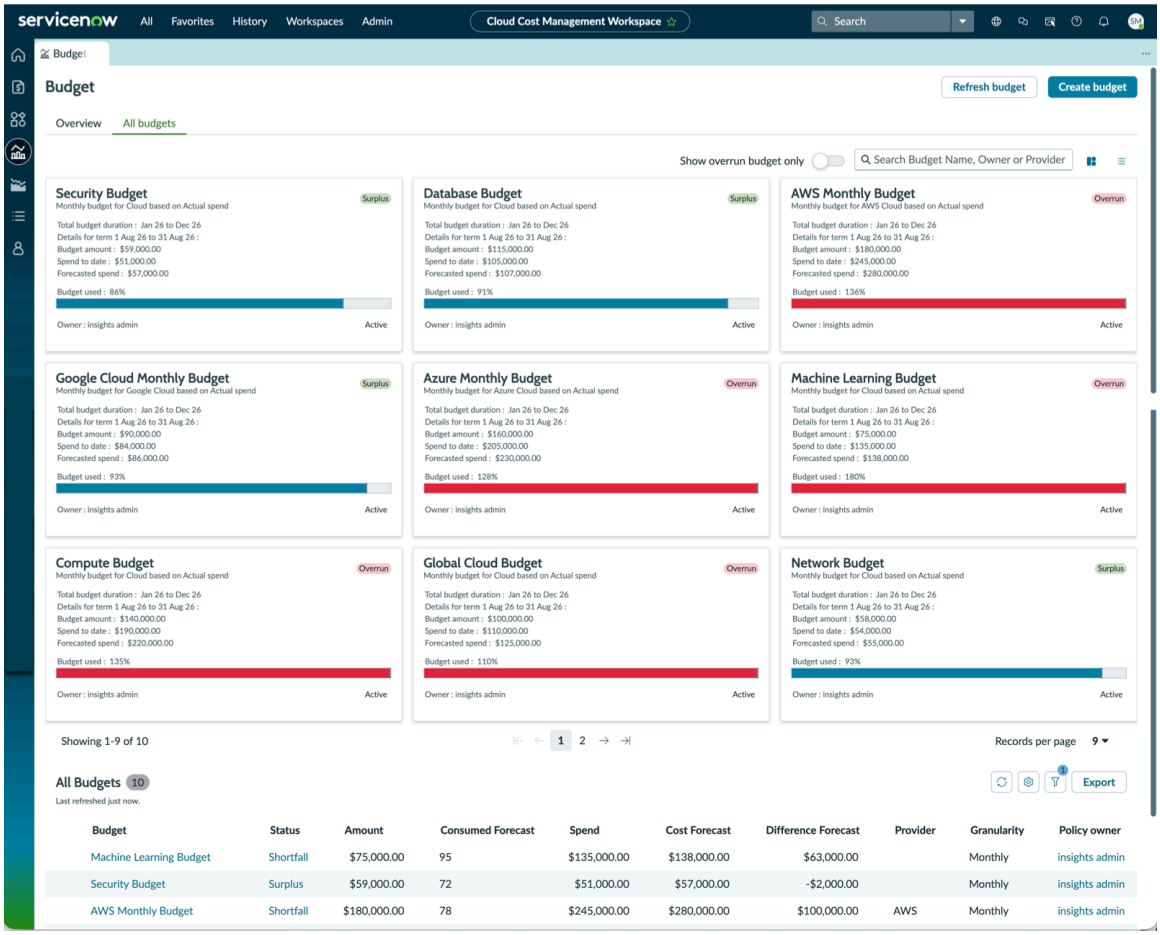
Budget overview

Report	Description
Total budget	Valid budget of your cloud assets for the current period.
Total spend	Total spend on your cloud assets for the current month. Indicates if your current spend is within or has exceeded the budget.
Forecasted spend	Forecasted spend based on the total spend on your cloud resources. Indicates if your forecasted spend is within the budget or has exceeded.
Budget vs Spend	Comparison between budget and current or forecasted spend of each budget policy. You can filter the data by: • Budget owner • Budget name • Budget vs current spend • Budget vs forecasted spend

All budgets

After you create or modify a budget policy, the policies get displayed on the **All Budgets** page. Find the details of the budget such as overrun, surplus, or invalid budgets. You can view only the overrun budgets by toggling the **Show overrun budget only** toggle button. Search a budget by its name, owner, or provider.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Budget card metrics

Metric	Description
Total budget duration	Total duration of the budget period.
Budget amount	The amount allocated for cloud spend during the budget duration.
Spend to date	The actual cloud spend accumulated from the start of the budget period to the current date.
Budget used	The percentage of the budget amount consumed to the current date. This metric is displayed as both a percentage value and a progress bar.
Forecasted spend	Forecasted spend based on the total spend on your cloud resources.

Business Insights view

The Business Insights view in the Cloud Cost Management Workspace provides a unified outlook of your cloud and non-cloud costs. This view helps finance, FinOps, and business teams understand the total cost of ownership (TCO) and unit economics for applications, departments, and business units.

The Business Insights view aggregates cloud costs from the Cloud Cost Management application with non-cloud costs from TCO. You must have the Enterprise Architecture plugin (com.snc.apm) installed on your instance for non-cloud costs to appear in the TCO dashboard.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

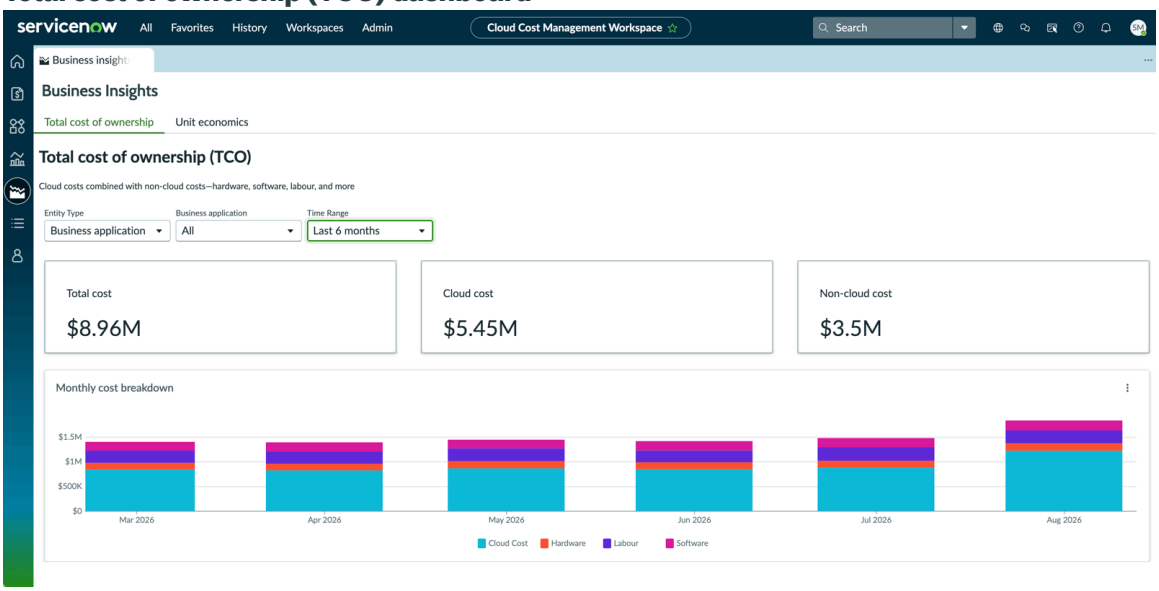
Access the Business Insights view by navigating to **Workspaces** > *Cloud Cost Management Workspace* > **Business insights**.

The Business Insights view includes the following dashboards:

- **Total cost of ownership (TCO)**: This dashboard displays cloud and non-cloud costs aggregated by business entity for a time range that you select.
- **Unit economics**: This dashboard displays the cost, revenue, and margin for a business application per unit of measurement that you define, such as API calls or number of customers. Unit economics data requires you to upload business data, including revenue and unit counts. For more information, see Upload business data for unit economics.

Total cost of ownership (TCO) dashboard

Total cost of ownership (TCO) dashboard



The Total cost of ownership (TCO) dashboard displays the following reports filtered by entity type and time range.

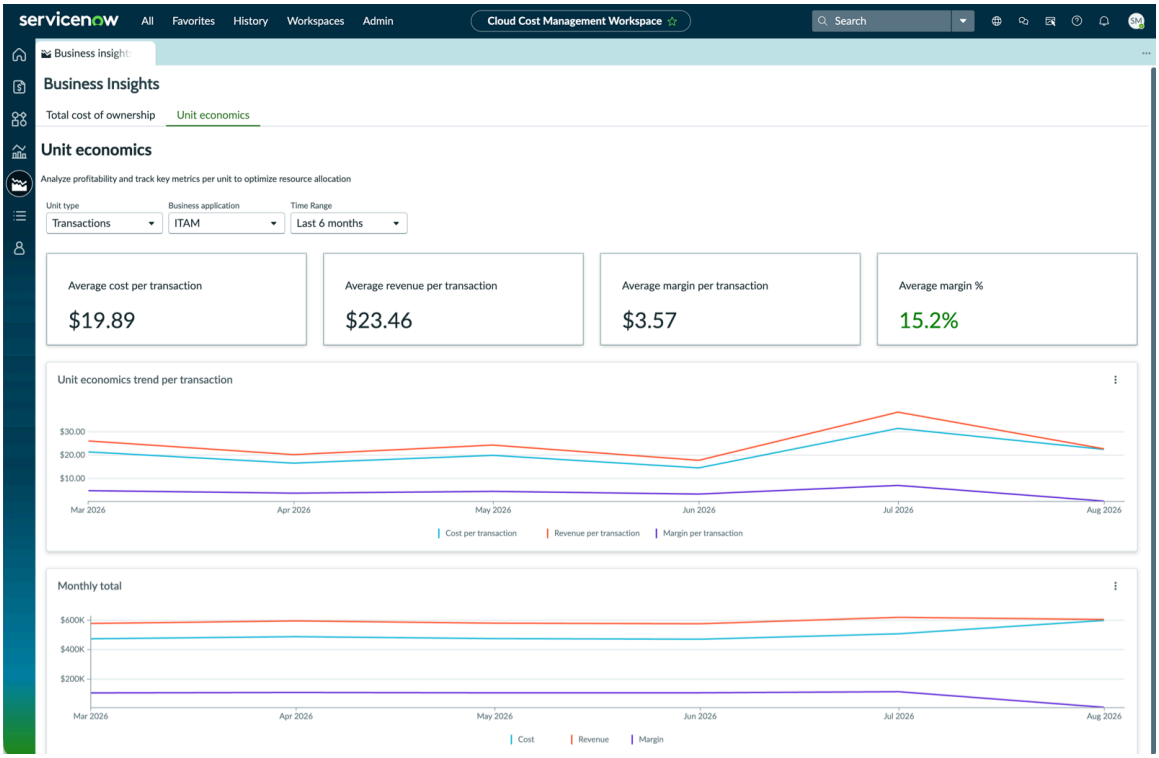
Report	Source	Description
Total cost	• Spend Report Monthly Aggregated Costs [sn_cld_spend_core_monthly_aggregated_cost] table • Enterprise Architecture plugin (com.snc.apm)	The total cost of your resources, including the cloud costs and non-cloud costs.
Cloud cost	Spend Report Monthly Aggregated Costs [sn_cld_spend_core_monthly_aggregated_cost] table	The total cost of your cloud resources.
Non-cloud cost	Enterprise Architecture plugin (com.snc.apm)	The total cost of your non-cloud resources, such as labor and licensing costs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Source	Description
Monthly cost breakdown	• Spend Report Monthly Aggregated Costs [sn_cld_spend_core_monthly_aggregated_cost] table • Enterprise Architecture plugin (com.snc.apm)	Monthly breakdown of cloud costs and non-cloud costs.

Unit economics dashboard

Unit economics dashboard



The Unit economics dashboard displays the following calculated values for each business application and time period.

Report	Description
Average cost per <unit type>	Total cost (cloud + non-cloud) divided by the number of units you upload for that period.
Average revenue per <unit type>	Average revenue of a unit type.
Average margin per <unit type>	Average revenue minus average cost.
Average margin %	Average margin expressed in percentage.
Unit economics trend per <unit type>	A comparative chart showing cost, revenue, and margin for the unit type for a particular time period.
Monthly totals per <unit type>	A comparative chart showing monthly totals for the unit type.

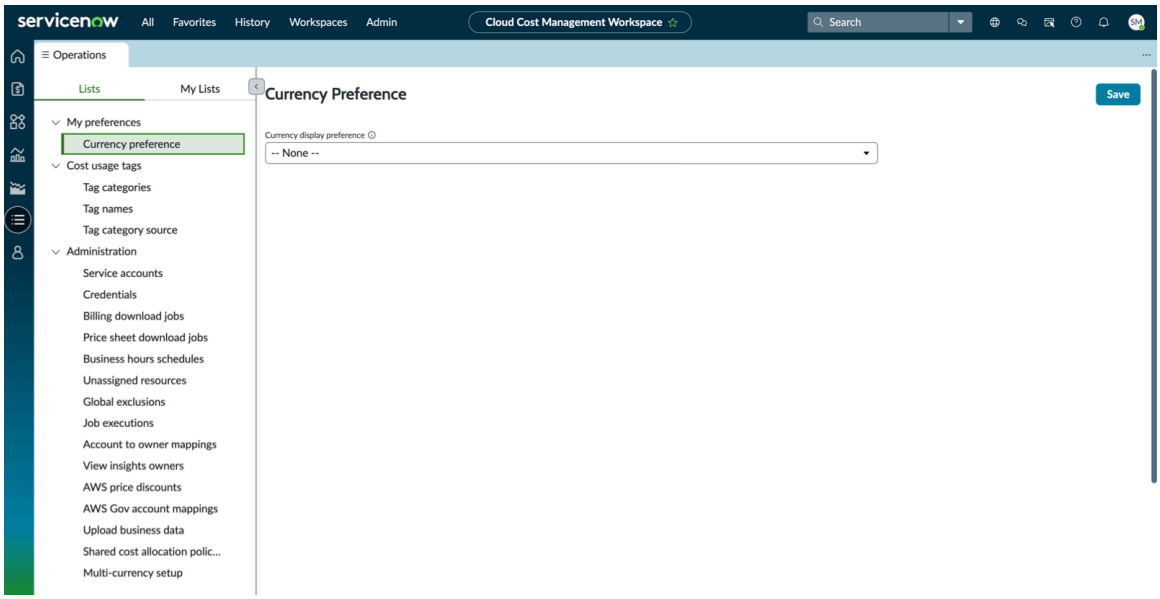
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operations view

Use the Operations view in the Cloud Cost Management Workspace to view and manage your preferences, cost usage tags, and administration-related operations.

Important: If you have the insights_owner role, only the accounts that are assigned to you appear in the filters and data.

Access the Operations view by navigating to **Workspaces** > *Cloud Cost Management Workspace* > **Operations**.



The Operations view includes the following categories of tasks:

- **My preferences** - **Currency preference**: Set up your preferred display currency for the dashboard widgets, recommendations (rightsizing, business hours, unused resources, reservation, and savings plan), budgets, and billing data. For more information, see Choose preferred currency for cost and usage data.

  Note: The option to set up your preferred currency is available with Cloud Cost Management 10.0.0 or later.

- **Cost usage tags**: Associate resource usage with particular business entities. For more information, see Cost usage tags.
  - **Tag categories**: Create and update tag categories. For more information, see Create and update a tag category.
  - **Tag names**: Create tag names for the tag categories.
  - **Tag category source**: Tag category source setting controls how the Cloud Cost Management application maps cloud resource tags to business entities for cost attribution and reporting. Available tag category source options are cloud provider tags, CMDB-driven cloud mapping, and ServiceNow-managed dimensions. For more information, see Select a tag category source.
- **Administration**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Service accounts**: Create service accounts for AWS, Azure, and Google to store the credentials and access information for your account.
  - Add an AWS service account
  - Add a Microsoft Azure government service account
  - Add a Google Cloud service account
- **Credentials**: Create credentials for accessing AWS, Azure, and Google accounts.
  - Set up access to AWS billing and usage data
  - Set up access to Microsoft Azure billing and usage data
  - Set up access to Google Cloud billing and usage data
- **Billing download jobs**: View, manage, and schedule the jobs that download billing data for AWS, Azure, and Google.
  - Schedule and manage the jobs that download AWS billing data
  - Schedule and manage the jobs that download Azure billing data
  - Schedule and manage the jobs that download Google Cloud billing data
- **Price sheet download jobs**: View, manage, and schedule the jobs that download the price sheet for AWS, Azure, and Google.
  - Schedule and manage the Cloud Cost Management jobs that download AWS price sheets
  - Schedule and manage the Cloud Cost Management jobs that download Microsoft Azure price sheets
  - Schedule and manage the Cloud Cost Management jobs that download Google Cloud price sheets
- **Business hours schedules**: Create a schedule for business hours. For more information, see Create Business hours schedule.
- **Unassigned resources**: View list of unassigned resources and details of the resources such as provider, region, CMDB CI, service account and category, and SyS ID.
- **Global exclusions**: Exclude resources for ensuring that cost data for a particular resource doesn't appear in a report. For more information, see Exclude a resource from all Cloud Cost Management reports.
- **Job executions**: View the job execution details of the following:
  - Billing download
  - Price sheet download
  - Spend
  - Budget
  - Rightsizing/Unused
  - Business hour
  - Unassigned
  - Commitments
- **Account to owner mappings**: Set up or update ownership of service accounts. For more information, see Assign service accounts to an insights_owner and Update or reassign insights_owner privileges.
- **View insights owners**: View the list of insights owner and also create a cloud service account. For more information, see View the service accounts owned by an insights_owner.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **AWS price discounts**: View and specify the provider discount rate for each service account. For more information, see Specify rate discounts to enable accurate pricing for Rightsizing recommendations.
- **AWS Gov account mappings**: Create mapping of AWS Gov account to a linked service account. For more information, see Create AWS Gov accounts mapping.
- **Upload business data**: Upload your revenue and unit count data to populate the Unit economics dashboard in the Business insights view. For more information, see Upload business data for unit economics.
- **Shared cost allocation policies**: Create, update, and view shared cost allocation policies with#different allocation types to split the cost of shared cloud resources among various business lines. For more information, see Create or update a shared cost allocation policy.
- **Multi-currency setup**: Set up or update the currency options for Cloud Cost Management users to view their cloud cost and usage data in their preferred currency. For more information, see Set up or update preferred currency options.

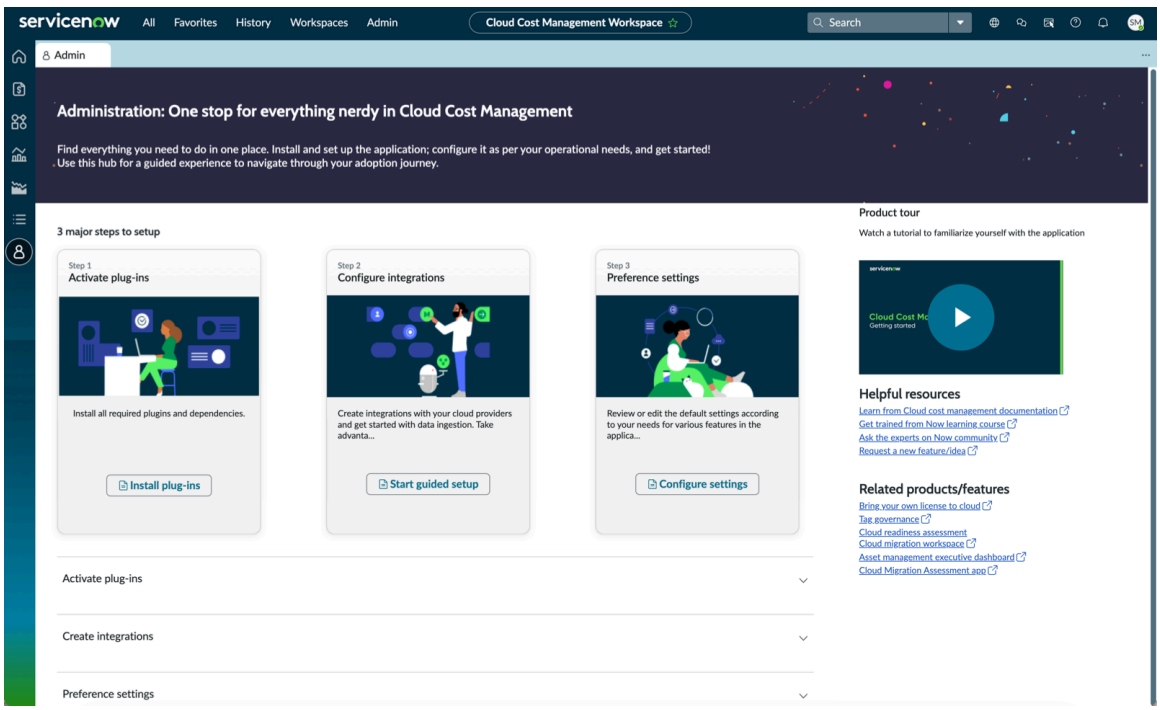
> **Note:** The multi-currency setup option is available with Cloud Cost Management version 10.0.0 or later.

Admin view

The Admin view in the Cloud Cost Management Workspace enables you to install, set up, and configure the application through a guided experience.

Use the Admin view to:

- Get to value faster by using Guided Setup for configuring Cloud Cost Management for AWS, Azure and GCP. Guided Setup provides a prescriptive guidance on the tasks that you must perform for completing the configuration. This Guided Setup organizes configuration activities into various categories tor ease of use.
- Watch a tutorial to familiarize with Cloud Cost Management.
- View helpful resources and related products or features.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Using Guided Setup to implement Cloud Cost Management

Guided Setup provides a sequence of tasks that help you configure Cloud Cost Management on your ServiceNow instance.

To open Cloud Cost Management Guided Setup for AWS, Microsoft Azure, and GCP, navigate to **Workspaces** > *Cloud Cost Management Workspace* > **Admin** > **Create integrations** > **Integrate**.

For more information, see Guided Setup.

Find the following steps on the Admin view for Guided Setup:

- **Activate plug-ins**: Verify that all required plugins and dependencies are installed.

  Note: You must add the Guided Setup 2.1.2 version.

- **Configure integrations**: Create integrations with cloud providers such as Amazon Web Services AWS, Microsoft Azure, and Google Cloud Platform (GCP).
- **Preference settings**: Review the default settings or edit them according to your needs for various features in the application.

Visibility into Cloud Cost Management KPIs using the Asset Management Executive Dashboard

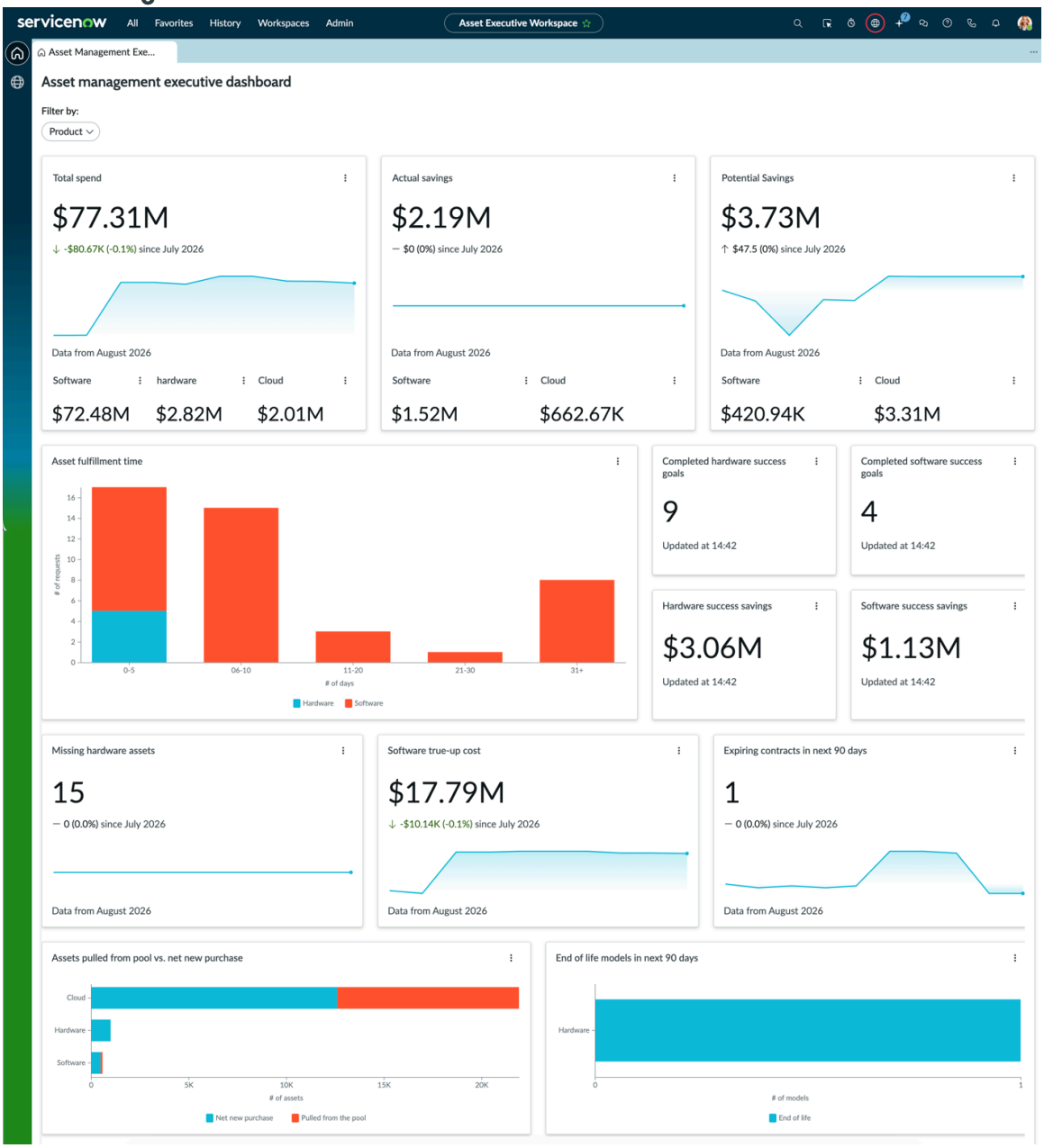
Use the Asset Management Executive Dashboard to gain visibility into critical KPIs for Hardware Asset Management, Software Asset Management, and Cloud Cost Management applications via a single dashboard.

To access the Asset Management Executive dashboard, you must either have Software Asset Management or Hardware Asset Management in your ServiceNow instance.

To view the Asset Management Executive dashboard, navigate to **Asset Executive Workspace** > **Asset Management Executive Dashboard**. A user with the role of sn_itam_common.asset_exec can access the dashboard.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard



You can filter the results in the dashboard by product, domain, or by both product and domain. If you filter by domain, the filter gets applied to all the widgets. If you filter by product, since some widgets are applicable for certain products, the filter isn't applied to all the widgets.

After you select a filter, a blue box gets displayed on the right side of each widget displaying one of the numbers:

- 0: Indicates that no filter is applied to a widget.
- 1: Indicates that only one filter is applied to a widget.
- 2: Indicates that both the filters are applied to a widget.

Note: To use the domain filter, you must activate the plugins: com.glide.domain.msp_extensions.installer and com.snc.pa.domain_support.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The schedule job, *Asset Management - Populate KPI aggregate table*, runs daily to update the data on the dashboard. To view the latest data for a widget, select the widget to display the list view page.

The dashboard widgets vary depending on the application plugins that you've activated in your instance. The widgets available with each application are listed in the following table:

Asset Management Executive Dashboard widgets

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
Total spend	Total cost of all entitlements for all products. Source table: License Metric Results [samp_license_metric_result].	Total cost of all hardware assets whose status is either **In stock**, **In use**, **In maintenance**,or **In transit** Source table: Hardware [alm_hardware].	Total active cost of all cloud resources. Source table: Spend Report Daily Aggregated Cost [sn_cld_spend_core_daily_aggregated_cost].
Actual savings	Total yearly savings for all products. This value is calculated as the total savings from closed complete reclamation candidates. Source table: Removal Candidate [samp_sw_reclamation_candidate].	Not applicable	This value is calculated as the monthly savings on cloud resources. **Note:** This widget gets displayed only if you have the Software Asset Management application installed on your instance. Source table: Cloud Insights Rightsizing Recommendation Automatics (sn_clin_core_rs_recommendation_automatic) where State = Completed.
Potential savings	Cost saved if removal candidates are reclaimed. Source table: Removal Candidate [samp_sw_reclamation_candidate].	Not applicable	Total of potential savings on a monthly basis on cloud rightsizing, cloud unused machines, cloud reservations, and cloud business hours. **Note:** This widget appears only if you have the Software Asset Management application installed on your instance. Source tables:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
			• Cloud Insights Rightsizing Recommendation Automatics [sn_clin_core_rs_recommendation_automatic]. • Cloud Insights Unused Recommendation [sn_clin_core_rs_unused_recommendation]. • Reserved Instance Recommendation [sn_clin_core_ri_recommendation].
Assessment fulfillment time	Fulfillment time bar graph of software requests from the Service Catalog. The graph shows the number of requests and the number of days taken to close those requests in the ranges of 0-5, 6-10, 11-20, 21-30, 31+ days. Source table: Asset fulfillment time [asset_fulfillment_time].	Fulfillment time bar graph of hardware requests from the Service Catalog. The graph shows the number of requests and the number of days taken to close those requests in the ranges of 0-5, 6-10, 11-20, 21-30, 31+ days. Source table: Asset fulfillment time [asset_fulfillment_time].	Not applicable
Completed software success goals	Number of success goals completed for the Software Asset Management application. Source table: SAM Success Goal [samp_success_goal]. **Note:** This widget is available only when the Software Asset Workspace (sn_sam_workspace) store application is installed.	Not applicable	Not applicable

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
Completed hardware success goals	Not applicable	Number of success goals completed for the Hardware Asset Management application. Source table: HAM Success Goal [sn_hamp_success_goal] **Note:** This widget is available only when Hardware Asset Management (sn_hamp) is installed.	Not applicable
Software success savings	Actual savings from completed success goals. Source table: SAM Success Goal [samp_success_goal]. **Note:** This widget is available only when the Software Asset Workspace (sn_sam_workspace) store application is installed.	Not applicable	Not applicable
Hardware success savings	Not applicable	Actual savings from completed success goals. Source table: HAM Success Goal [sn_hamp_success_goal]	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
		Note: This widget is available only when Hardware Asset Management (sn_hamp) is installed.	
Missing hardware assets	Not applicable	Count of missing, lost, or stolen hardware assets. Source table: Missing Hardware Assets [missing_hardware_assets].	Not applicable
Software true-up cost	Cost of the products actually being used. Source table: Product Results [samp_product_result].	Not applicable	Not applicable
Expiring contracts in 90 days	Count of software contracts that are going to expire in the next 90 days.	Count of hardware contracts that are going to expire in the next 90 days.	Not applicable

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
	Note: If the Software Asset Management application and the Hardware Asset Management application both exist in your instance, then this widget shows the total number of software and hardware contracts together; not individual contracts for software and hardware.	**Note:** If Software Asset Management and Hardware Asset Management both exist in your instance, then this widget shows the total number of software and hardware contracts together; not individual contracts for software and hardware.	
Assets pulled from pool vs net new purchase	Bar charts representing the number of requests for software assets being fulfilled from your inventory versus creating purchase orders for new assets. **Note:** Ensure that the Procurement (com.snc.procurement) plugin is activated in your instance to view software-related data for this widget. Source tables: • Pool assets: Assigned Allocations [alm_licenses_assigned].	Bar charts representing the number of requests for hardware assets being fulfilled from your inventory versus creating purchase orders for new assets. Source tables: • Pool assets: Consume Asset Task [consume_asset_task]. • Net new assets: Purchase order line items [proc_po_item].	Bar charts representing the number of assets used from your inventory versus new assets being procured via purchase orders. Source tables: • Pool assets: Spend Report Monthly Cost [sn_cld_spend_core_monthly_cost]. • Net new assets: Purchase order line items [proc_po_item].

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management Executive Dashboard widgets (continued)

Widget	Software Asset Management	Hardware Asset Management	Cloud Cost Management
	• Net new assets: Purchase order line items [proc_po_item].		
End of life models in next 90 days	Number of software models that are reaching their end of life in the next 90 days. • End of life • End of support • End of extended support Source table: Software Lifecycle Report [sam_sw_product_lifecycle_report].	Number of hardware models that are reaching their end of life in the next 90 days. • End of life • End of support • End of extended support Source table: Hardware model [cmdb_hardware_model_lifecycle].	Not applicable

Discovering your cloud resources for use

Select the service accounts to discover, the credentials for accessing the accounts, and the MID Servers that scan the resources. If you use the Discovery application, the Discovery Manager wizard simplifies the configuration process for discovering cloud attributes. If you use a different method for discovering resources, you can skip this configuration operation.

Initial set up from the home page

Important: This configuration process applies only if you use the Discovery application to discover cloud resources. You skip this configuration operation if you use a different method such as Service Graph Connector to discover resources. For more information about this method, see Service Graph Connectors.

During initial installation, on the home page, when you select the **Set up Discovery Schedule** button in the Configure and Run Discovery section, the Discover Schedules form opens. For detailed instructions for different cloud providers, see:

- AWS events-driven discovery or AWS SSM discovery
- Azure Cloud Discovery
- Google Cloud Platform Discovery

About Cloud Discovery

The Cloud Discovery plugin includes the necessary components from Cloud Provisioning and Governance to perform Cloud Discovery. For more information, see Cloud Discovery.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Discovery basics

Unused resources

The Unused resources feature analyzes usage data to identify resources that are wasting money because they aren't used. Schedule Unused resources jobs to power off or terminate the resources that you specify.

Recommendations

For AWS and GCP, database recommendations are fetched from the provider. For Azure, Cloud Cost Management generates recommendations for idle databases.

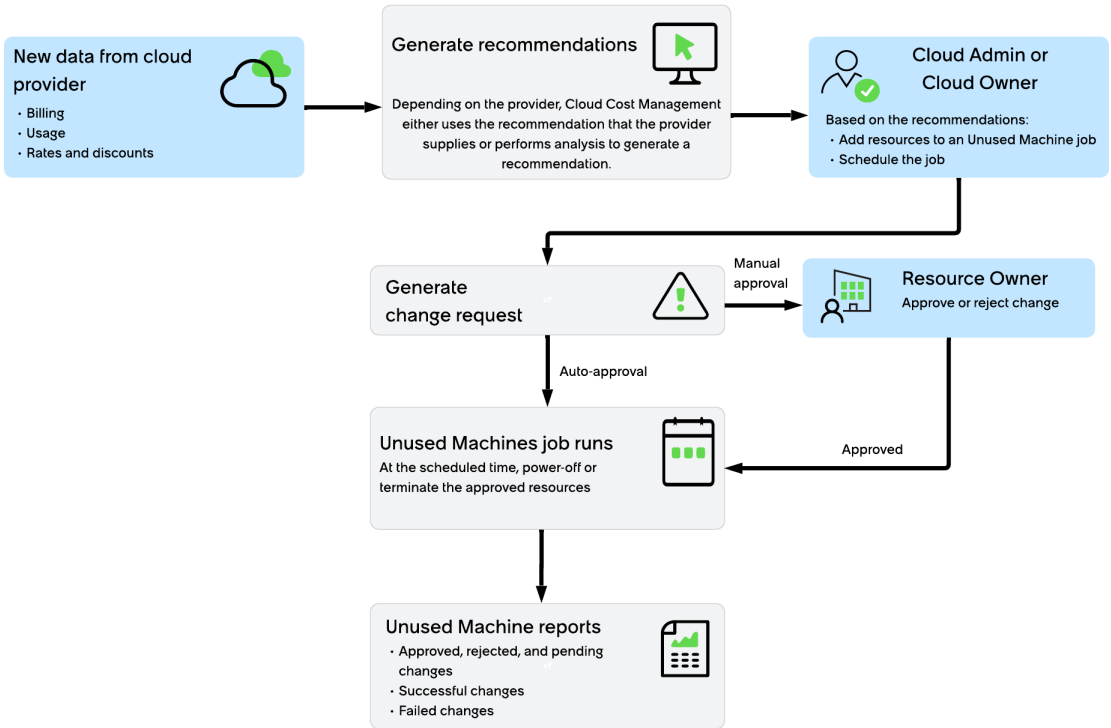
Storage volume recommendations are fetched for AWS, Azure, and GCP from the providers:

- AWS (AWS Elastic Block Store for Storage Volumes)
- Azure (Azure Disk for Storage Volumes)
- GCP (Persistent Disk for Storage Volumes)

Cloud Cost Management generates aged snapshot recommendations for the following providers:

- AWS (Amazon EBS Snapshot)
- Azure (Azure Snapshot for Storage Snapshots)
- GCP (GCP Snapshot for Storage Snapshots)

How the Unused resources feature works



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. On the Unused resources recommendations page, select the resources to terminate or power off based on your analysis of the recommendations. For more information, see Manage unused resources.
2. Add the resources to an Unused resources job, either a new job or an already-defined job.
3. Specify the date and time for the job to run.
4. Specify the action to take on the selected resources:
   - Power off the resource.
   - Terminate the resource.
   - Terminate the resource and delete storage. Only root or primary storage is deleted.
5. Specify the type of approval required for the specified action. Unused resources operations are directly integrated with the ServiceNow Change Management feature.
   - **Auto-approval**: Generates a Standard Change request and the change request is auto-approved.
   - **Manual approval**: Generates a Normal Change request and the appropriate user approves the change request.
6. Specify the Change template to use when generating the change requests.
7. Save the job.

The system immediately generates the change requests. Later, at the scheduled time, the system runs the job to power off or terminate all resources for which the changes are approved. The instance updates Unused resources reports with new recommendations and with approved, successful, pending, rejected, and failed changes. For resources that failed power off or termination, you can reschedule the resources into another job.

How Cloud Cost Management generates Unused resources recommendations

Cloud Cost Management uses an optimized process for each provider.

- Unused resources analysis for AWS
- Unused resources analysis for Microsoft Azure
- Unused resources analysis for Google Cloud

Related topics

Schedule unused resources to be powered off or terminated

Change Management

Exclude a resource from all Cloud Cost Management reports

Unused resources analysis for AWS

Cloud Cost Management uses an optimized Unused resources process for each provider. For AWS, Cloud Cost Management compares the calculated potential costs to actual billed costs and then generates recommendations.

How Unused resources analysis works for AWS

To generate accurate Unused resources recommendations, Cloud Cost Management follows this procedure every time billing data is updated:

- Obtain costs from the updated billing data tables.
- Collect the CPU and memory usage data for each resource for the preceding 14 days.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Obtain rates for resource types and sizes from the price sheet data tables.
- If available, obtain percentage discount rates from the discount tables and apply the appropriate discounts to the rates on the price sheet.
- Compare the calculated potential costs to the actual billed costs and then generate recommendations.
  - If the average top 20% of CPU usage is less than 1%, then the resource is recommended for Unused resources processes.
  - If the average top 20% of CPU usage is greater than 1% but less than 40%, then the resource is recommended for Rightsizing processes. The recommended memory size is calculated so that the peak usage during the analysis period would be no more than 80% of the recommended size. For example, a resource currently has 16 GB and the available sizes are 4 GB, 8 GB, and 16 GB. If the resource used a peak of 3.99 GB over the analysis period, then the recommendation would be 8 GB.

Resources that aren't considered

Resources with the following AWS attributes aren't considered for Unused resources recommendations:

- Members of an Auto Scaling group (ASG)
- Burstable
- Not in a VPC
- Not backed by an EBS root volume
- Don't have enhanced network support
- Virtualization type isn't HVM
- Spot instance

Unused resources analysis for Microsoft Azure

Cloud Cost Management uses an optimized Unused resources process for Microsoft Azure to identify optimization opportunities specific to your environment.

How Unused resources analysis works for Microsoft Azure

Cloud Cost Management generates recommendations that appear in the Unused resources reports from multiple sources. The recommendations module consolidates insights from both cloud provider APIs and Cloud Cost Management analysis engines.

Cloud Cost Management-generated recommendations

These recommendations are based on analysis of billing data, usage metrics, and configuration policies. These are updated after each billing download job runs.

Cloud provider-sourced recommendations:

These recommendations are integrated from Azure Advisor service and are refreshed when the integration job completes.

For details on how the values are generated, see the Azure Advisor documentation at Microsoft Learn.

Unused resources analysis for Google Cloud

Cloud Cost Management uses an optimized Unused resources process for each provider.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

How Unused resources analysis works for Google Cloud

The Google Cloud compute engine generates the recommendations that appear in the Unused resources reports. Cloud Cost Management displays the recommendations that the Google Cloud compute engine generates. Cloud Cost Management updates the reports whenever billing data is updated.

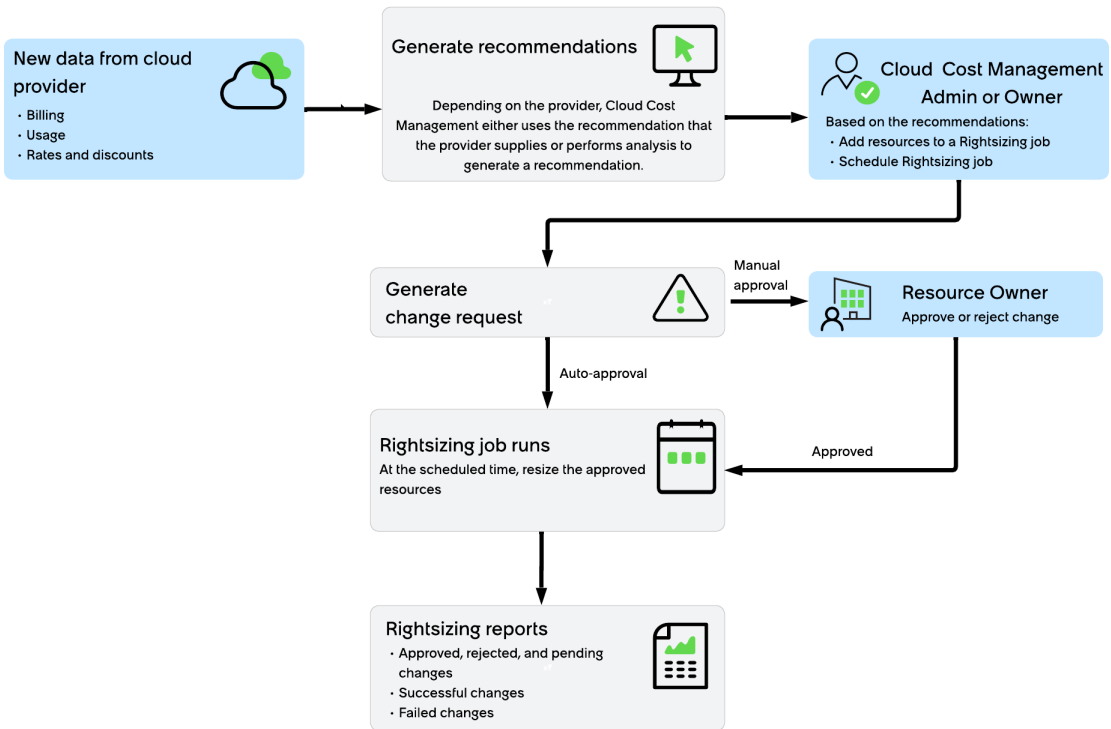
Note: The Google Cloud console may show the same resources for both Unused resources and Rightsizing recommendations. If the same resources are displayed, Cloud Cost Management shows the information in Unused resources and excludes it from the Rightsizing recommendations with the reason, `Recommendation already present in unused`.

To get the recommendations from the Google Cloud console and perform start, stop, resize, and delete operations, you must have specific roles and permissions. For detailed information on these permissions, see Setup roles for Google Cloud billing download.

Rightsizing resources

The Rightsizing feature analyzes resource usage to recommend better sizes for resources that are wasting money by being over-provisioned or underused. A confidence rating and predicted savings support each recommendation. Schedule Rightsizing jobs to resize the resources you specify.

How Rightsizing works



The system updates Rightsizing recommendations each time that billing and usage data are updated.

Follow this process to define a Rightsizing job:

1. On the Rightsizing recommendations page, select the resources to rightsize based on your analysis of the recommendations. For more information, see Resize resources with Rightsizing.
2. Add the resources to a Rightsizing job. The job can be a new or an already-defined one.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Specify the date and time for the job to run.
4. Specify the type of approval required for the Rightsizing action.

   Rightsizing operations are directly integrated with the ServiceNow Change Management feature.

   - **Auto-approval**: Generates a Standard Change request and the change request is auto-approved.
   - **Manual approval**: Generates a Normal Change request and the appropriate user approves the change request.
5. Save the job.

When you save the job, the system immediately generates the change requests. Later, at the scheduled time, the system runs the job. The job performs the following operations:

- For each approved change, resize the resource. For a resource in the *ON* state, stop the resource, resize it, and then restart it. If the attempt to resize fails, perform a rollback. For more information, see AWS only – Rollback on failed Rightsizing attempts.
- Update the Rightsizing reports with new recommendations and with approved, successful, pending, rejected, and failed changes.

For pending, rejected, and failed change requests, you can reschedule the resources into another job.

Note: Rightsizing operation on a stopped AWS Relational Database Service (RDS) database isn't supported from the AWS provider. If you try to perform Rightsizing on stopped databases, the resize operation fails with the error `InvalidDBInstanceState - You can't modify a stopped DB instance. Start the DB instance, and then modify it..`

How Cloud Cost Management generates Rightsizing recommendations

Cloud Cost Management uses a process that is optimized for each provider.

- Rightsizing analysis for AWS
- Rightsizing analysis for Microsoft Azure
- Rightsizing analysis for Google Cloud

Recommendations

The Cloud Cost Management application can generate recommendations for Virtual Machines (AWS, Azure, GCP), SQL Databases (Azure, GCP), and RDS Databases (AWS). CPU, memory, and network usage metrics are used to generate database rightsizing recommendations for the database resources.

The Cloud Cost Management application generates recommendations for storage volumes for AWS and Azure providers:

- Cloud category - AWS Elastic Block Store for Storage Volumes: Service category is storage.
- Cloud category - Azure Disk for Storage Volumes: Service category is storage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Confidence levels in recommendations

Each recommendation that the system makes to rightsize a resource has an associated confidence level. You consider the confidence level while deciding whether to rightsize a resource. Confidence levels reflect the following factors:

- High confidence requires the following conditions:
  - The system has 10 or more days of usage data for the resource.
  - The current and recommended family/generation are identical.
- Medium confidence requires the following conditions:
  - The system has less than 10 days of usage data for the resource.
  - The current and recommended family/generation are identical.
- Low confidence: The current and recommended family/generation are different.

Rightsizing analysis for AWS

Cloud Cost Management uses a process that is optimized for each provider. For AWS, Cloud Cost Management compares the calculated potential costs to actual billed costs and then generates recommendations.

How Rightsizing resources analysis works for AWS

To generate accurate Rightsizing resources recommendations, Cloud Cost Management follows this procedure every time billing data is updated:

- Obtain costs from the updated billing data tables.
- Collect the CPU and memory usage data for each resource for the preceding 14 days.

> **Important:**
>
> - To enable Rightsizing, you must define memory metrics to obtain memory usage data. For more information, see Define a metric threshold.
> - Recommendations are generated only for CPU usage data.

- Obtain rates for resource types and sizes from the price sheet data tables.
- If available, obtain percentage discount rates from the discount tables and apply the appropriate discounts to the rates on the price sheet.
- Compare the calculated potential costs to the actual billed costs and then generate recommendations.
  - If the average top 20% of CPU usage is less than 1%, then the resource is recommended for Unused resources processes.
  - If the average top 20% of CPU usage is greater than 1% but less than 40%, then the resource is recommended for Rightsizing processes. The recommended memory size is calculated so that the peak usage during the analysis period would be no more than 80% of the recommended size. For example, a resource currently has 16 GB and the available sizes are 4 GB, 8 GB, and 16 GB. If the resource used a peak of 3.99 GB over the analysis period, then the recommendation would be 8 GB.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: If you have installed the Cloud Cost Management Infra Stack application, for AWS Rightsizing recommendations to work accurately, you must use the `GetCostAndUsageWithResources` API to retrieve the cost and usage metrics with resources for your account from your provider (through AWS Portal). For more information, see GetCostAndUsageWithResources API Reference topic in the AWS Billing and Cost Management Documentation.

Resources that aren't considered

Resources with the following AWS attributes aren't considered for Rightsizing recommendations:

- Members of an Auto Scaling group (ASG)
- Burstable
- Not in a VPC
- Not backed by an EBS root volume
- Don't have enhanced network support
- Virtualization type isn't HVM
- Spot instance

AWS only – Rollback on failed Rightsizing attempts

AWS only: If a Rightsizing action fails, the system immediately performs a rollback to return the resource to its original size, restarts the resource if needed, updates the change request with full details, and updates Rightsizing report data.

Note:

This description of rollback operations applies only to AWS environments. Cloud Cost Management performs rollback operations for AWS environments.

Cloud Cost Management doesn’t perform rollback for Microsoft Azure environments. Instead, the Azure Update service performs rollback.

Rollback operations (AWS only)

In a successful Rightsizing job, the system resizes each resource that has an approved change request. If a resource is in the *ON* state, the process stops the resource, resizes (modifies) it, and then restarts it. If a resource is in the *OFF* state, the process resizes the resource but doesn’t start it.

A resource might fail to restart, for example, when the new size would exceed the quota limit for a resource type or for a constrained availability zone.

A Rightsizing job proceeds in batches of resources, grouped by provider/service account/region. If any modified resource in a batch fails to restart, then each resource in the batch is rolled back to its original size and then restarted. The system then updates the change requests for the resources and sets the **Rightsizing recommendation** status on Rightsizing reports to **Failed**.

Resources in a batch that were in the *OFF* state aren’t rolled back or marked as failed.

Rightsizing analysis for Microsoft Azure

Cloud Cost Management uses an optimized Rightsizing process for Azure to identify optimization opportunities specific to your environment.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

How Rightsizing analysis works for Microsoft Azure

Cloud Cost Management generates recommendations that appear in the Rightsizing reports from multiple sources. The recommendations module consolidates insights from both cloud provider APIs and Cloud Cost Management analysis engines.

Cloud Cost Management-generated recommendations

These recommendations are based on analysis of billing data, usage metrics, and configuration policies. These are updated after each billing download job runs.

Cloud provider-sourced recommendations:

These recommendations are integrated from Azure Advisor service and are refreshed when the integration job completes.

For details on how the values are generated, see the Azure Advisor documentation at Microsoft Learn.

Rightsizing analysis for Google Cloud

Cloud Cost Management uses an optimized Rightsizing process for each provider.

How Rightsizing analysis works for Google Cloud

The Google Cloud compute engine generates the recommendations that appear in the Rightsizing reports. Cloud Cost Management displays the recommendations that the Google Cloud compute engine generates. Cloud Cost Management updates the reports whenever billing data is updated.

For details on how the values are generated, see Google Cloud documentation.

Note: The Google Cloud console may show the same resources for both Unused resources and Rightsizing recommendations. If the same resources are displayed, Cloud Cost Management shows the information in Unused resources and excludes it from the Rightsizing recommendations with the reason, `Recommendation already present in unused`.

To get the recommendations from the Google Cloud console and perform start, stop, resize, and delete operations, you must have specific roles and permissions. For detailed information on these permissions, see Setup roles for Google Cloud billing download.

Business hours

A Business Hours job applies policies to identify cloud resources that are running when they should be powered off. It reports those resources and starts or stops them on a schedule you define. Running resources during business hours only can help reduce your cloud spend.

The insights_admin role can create policies for AWS and GCP databases.

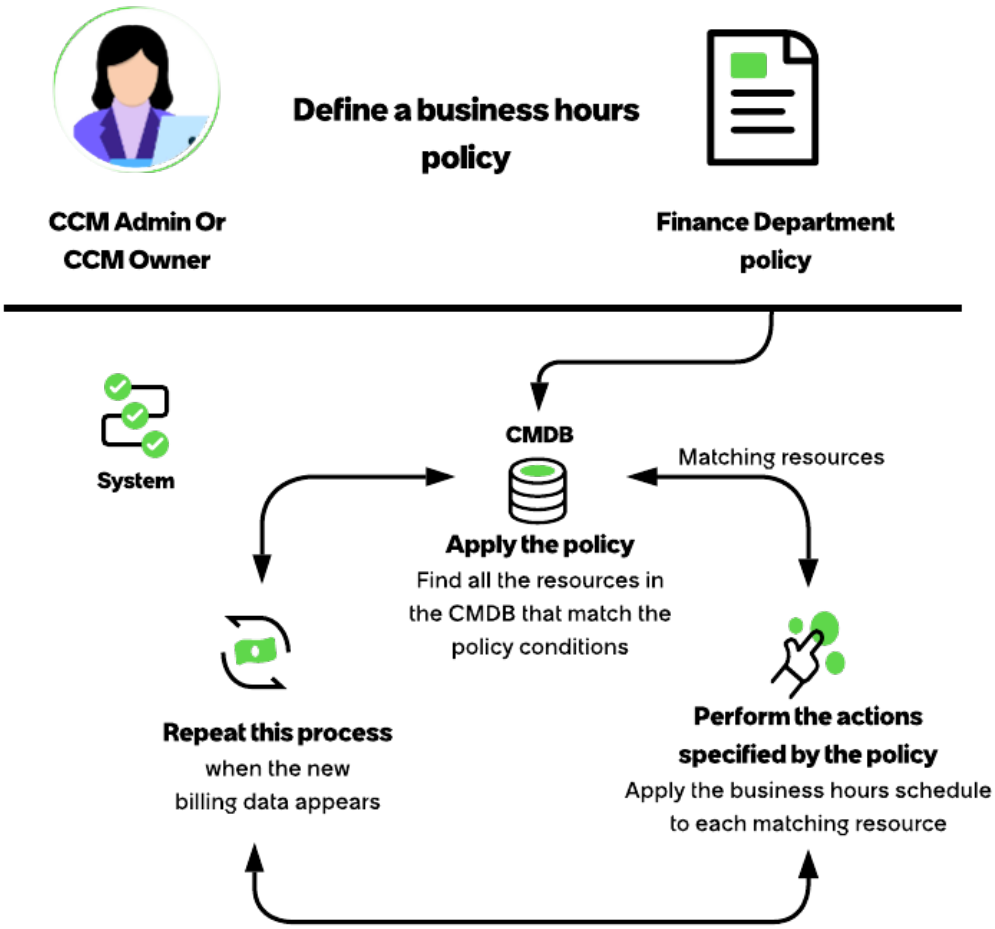
Note: Azure supports compute resources only. Database resources aren't supported for Business hours on Azure.

How the Business hours feature works

Each successful Billing Download job triggers Business hours, along with the Budget forecast, Reservation plans, Rightsizing, and Unused resources, to analyze the spend and usage data. It also updates the actionable recommendations in the reports.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

How the Business Hours feature works



The Business hours process runs as follows:

1. For each Business hours policy, the system queries the CMDB to identify resources that match the policy criteria.
2. For each matching resource, the system updates Business hours reports showing spend during and outside business hours for the last 30 days.
3. Based on the policy's approval type, the system generates change requests to enforce the on/off schedule. Business hours operations are directly integrated with the ServiceNow® Change Management feature. Either of the following change requests are generated:
   - A change request for each resource that matches a policy.
   - A single change request that applies to all CIs that match the policy.
4. When a change request is approved, the system schedules on/off actions for the matching resources as specified in the policy.
5. The process repeats each time billing data is updated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: Provider-specific behavior

AWS only: AWS Auto Scaling group (ASG) operations maintain minimum capacity for ASG-member resources. To avoid conflicts, the Cloud Cost Management application excludes all ASG-member instances from Business hours operations. You can view excluded resources on the **Excluded Resources** tab for Business hours.

Google Cloud only: Instances can be defined as Managed instance groups (MIGs), which run identical VMs across multiple zones with automated autoscaling, auto-healing, and automatic updating. VMs that are part of an MIG are excluded from Business Hours policies because MIGs automatically restart stopped instances.

Cloud Cost Management recommendations for Business hours

Before scheduling on/off actions, Cloud Cost Management generates Business hours recommendations natively within ServiceNow. These recommendations surface in the Business hours reports and give you visibility into resources that are running outside their required hours, without requiring you to take immediate action.

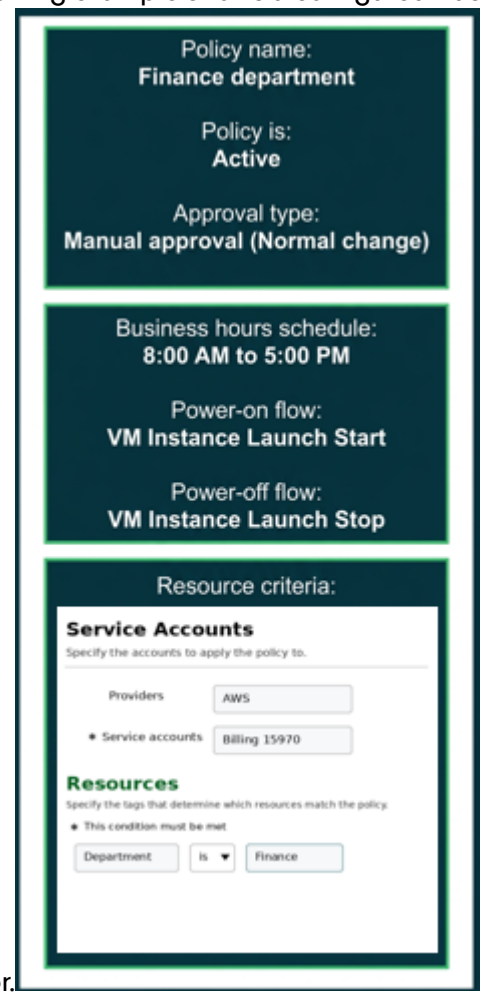
Use the Report-only approval type as a starting point for reviewing recommendations and validating your policy criteria before enabling automated scheduling. This enables you to assess potential savings and confirms resource matches before committing to on/off actions.

Recommendations are scoped to resources discovered and tracked in the CMDB. Only resources that match your policy's provider, service account, and tag criteria appear in the reports. This ensures the Business hours recommendations reflect your actual managed cloud estate rather than all billing data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Example: Finance department Business hours policy

The following example shows a configured Business hours policy and its behavior.



- The policy is active, which is applied every time billing and usage data is updated.
- The approval type is Manual approval (Normal Change), which means after a qualified user approves the change request, the schedule for resources that match the policy is adjusted.
- The Business hours (on/off) schedule is **ON** from 8:00 a.m. to 5:00 p.m.
- The power-on and power-off flows are specified.
- Only resources that meet the following resource criteria match the policy:
  - The cloud provider is `AWS` and the service account is `Billing 15970`.
  - The resource has a tag with the name *`Department`* with the value `Finance`.

For each resource that matches this policy and where the change request is approved, the system starts the resource at 8:00 a.m. and stops it at 5:00 p.m.

Note: Actual start and stop times may vary slightly due to system demand and the time required for resources to start and stop.

Business hours approval types

The approval type you select in a policy determines what actions the system takes for each resource that matches the policy criteria.

Auto-approval (Standard Change) approval type

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Generates a recommendation to apply the specified business hours and add the resource to the Business hours reports.
- Generates and then auto-approves a change request for the change group.
- Adds the resource to the Business hours reports.
- Applies the Business hours schedule to the resource.

Manual approval (Normal Change) approval type

- Generates a recommendation to apply the specified business hours schedule and add the resource to the Business hours reports.
- Generates a change request for members of the change group.
- Adds the resource to the Business hours reports.
- Any member of the group with the sn_change_write role can approve the change request.
- When approved, applies the Business hours schedule to the resource.

Report-only approval type

- Generates a recommendation to apply the specified business hours.
- Adds the resource to the Business hours reports.

Related topics

Define or update a Business hours policy

Change Management

Exclude a resource from all Cloud Cost Management reports

Commitments

The Commitments feature recommends resources that could decrease costs by the conversion of on-demand payment plans to reservation plans. These plans are also called committed-use discounts, committed-use savings plans, or reserved instance plans.

Note: Azure Managed Disk reserved instance to save over your on-demand costs is supported.

How the Commitments feature works

1. Each time billing and usage data updates, the system identifies resources recommended by your provider for reservation plans. These are resources projected to cost less under a reservation plan over their planned lifetime.
2. The Commitments feature sorts the resources by estimated savings and displays the list on the **Commitments** page. You can view the list by navigating to **Cloud Cost Management Workspace** > **Optimization** > **Commitments**.

   For more information, see Reduce resource cost with Commitments.
3. The **Commitments** page has following tabs that you can use to sort the recommendations into categories.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **New**: This tab lists the recommendations that haven't been reviewed. After reviewing a recommendation, you can select **Accept** or **Decline** as appropriate.
- **Accepted**: This tab lists the recommendations that have been accepted after a review. After the review, select a recommendation and then select **Accept**. The recommendation moves to the **Accepted** tab.
- **Declined**: This tab lists the recommendations that have been declined after a review. After the review, select a recommendation and then select **Decline**. The recommendation moves to the **Declined** tab.

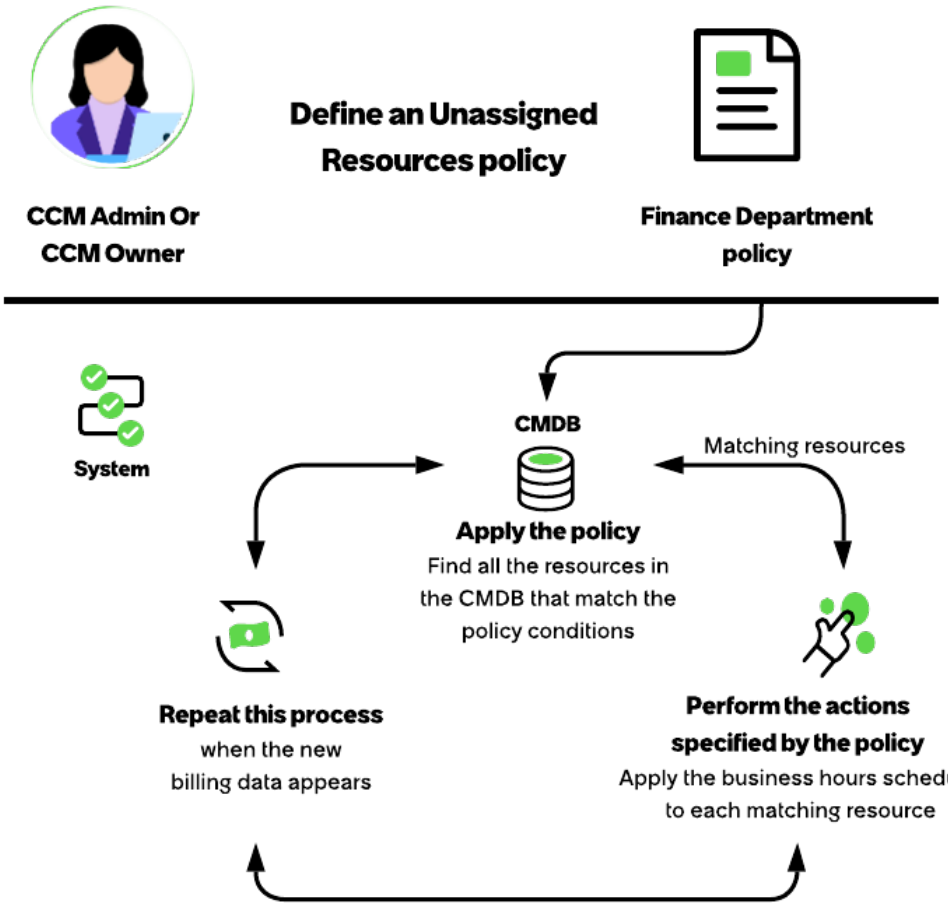
Unassigned resources

Unassigned resources policies help you to identify the resources that aren’t associated with a change group and to assign them appropriately. When a resource is assigned to the correct group, the resource can be appropriately governed even as it goes through stages such as patching, upgrading, and reconfiguring.

The Cloud Cost Management application can generate compute and database recommendations for AWS, Azure, and GCP. The latest data is fetched every day at midnight.

How Unassigned resources processes work

For cloud billing information to be accurate, it must include all resources in your managed cloud infrastructure. An Unassigned resources policy analyzes all resources to identify resources that aren’t assigned to a change group. The policy can then auto-assign the appropriate change group to the resources. Unassigned resources jobs follow this



process:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Requirements and limitations

- The Discovery process triggers Unassigned Resources analysis and updates recommendations in reports.
- For AWS, the Unassigned Resources feature supports AWS EC2 instances only.
- Terminated, retired, or canceled resources aren't considered.
- Data appears on reports only when at least one policy is active.

Cloud budgets

To manage your cloud spend, you can define and monitor custom budget plans. The system compares the plans with billing data to calculate and report on how well budgets are being met. Understanding budget compliance by groups and service accounts can significantly improve oversight and reduce cloud spend.

How budget analysis works

Each successful Billing download triggers budget refresh automatically. Budget refresh is also triggered manually when a new Budget policy is created.

Budget Forecast jobs use the cost forecast data from the providers and follow this process:

1. Apply each budget plan to billing data. For more information about plans, see are described in Create or update a budget policy.
2. Update all Budget Forecast reports.
3. Repeat the process whenever billing data is updated or a user requests budget reanalysis.

Note: If there's a large number of users, the users may not load correctly or may fail to load to the Budget view. See the Knowledge article for more information KB0866547.

Related topics

Manage cloud budgets

Cloud service categories in Cloud Cost Management

Provider services are grouped into service categories in Cloud Cost Management. This grouping enables you to use filters to focus your analysis on particular types of service.

To perform targeted analysis, you can filter for particular services within a service category. For example, Amazon ElastiCache or Azure Database for PostgreSQL are services in the Database category.

Here are the supported cloud service categories in Cloud Cost Management:

- Cloud service categories in Cloud Cost Management for Microsoft Azure services
- Cloud service categories in Cloud Cost Management for Amazon AWS Cloud services
- Cloud service categories in Cloud Cost Management for Google Cloud services

Cost usage tags

Cost usage tags in the Cloud Cost Management application are the tag key-value pairs that cloud providers attach to billing line items when resources are deployed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Overview of Cost usage tags

Cost usage tags represent the metadata that your teams define in AWS, Azure, or Google Cloud to identify who owns a resource, what it's for, or which business entity it belongs to. For example, a tag key of `App` with a value of `Payments-Service`.

On their own, raw providers tags might be inconsistent across teams and providers. Cloud Cost Management solves this with tag categories, which group multiple tag names under a single normalized label. This enable cost reports to accurately reflect business entities regardless of possible tagging inconsistencies across your cloud environment.

Tag categories

Tag categories in the Cloud Cost Management application enable grouping multiple tag names under a single category, making it simpler to track costs against specific business entities. In the provider portal, you can define cost tags to associate resource usage with specific business entities. For example, the `Application`, `Test`, and QA tags represent cost centers.

Overview of tag categories

The Cloud Cost Management application enables you to enhance your cost management capabilities and ensure that the cost reports accurately reflect the business entities. For example, different users might create multiple tag names like "App", "AppService", and "appl" to represent applications. By creating a tag category named "Application", you ensure that costs associated with these different tag names are correctly assigned to the "Application" category. You can add multiple tag names to a category during or after its creation. For more information, see Create and update a tag category.

Key points and considerations

- Tag categories help in organizing and consolidating cost data from different sources.
- Tag categories also enable more accurate cost reporting by grouping related tags together.
- Cost categories are updated with new cost tag values each time billing data is downloaded through a Billing Download job.
- Recent updates to tag category definitions might not be immediately reflected in cost reports.
- To apply the latest tag category definitions to cost data without waiting for the next Billing Download job, you can manually reapply the categories. Reapply tag categories by navigating to *`Cloud Cost Management Workspace`* > **Operations** > **Cost usage tags** > **Tag categories** > **Reapply tag categories**.

Tag category source

The Tag category source setting controls how the Cloud Cost Management application maps cloud resource tags to business entities for cost attribution and reporting.

The Cloud Cost Management application compares billing data with tag categories to calculate and report cloud spend by business entity. By default, tag categories are defined independently in the Cloud Cost Management application. With the tag category source setting, cloud admins can align cost attribution with the CMDB-driven cloud mapping taxonomy already maintained in their ServiceNow instance. This eliminates the need to duplicate business tagging in each cloud provider.

When you select a tag category source, that selection determines how spend tags are derived during each billing download. It also determines how costs are grouped in analytics, forecasting, and recommendations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tag category source options

The Cloud Cost Management application provides the following tag category source options:

Cloud provider resource tags

This is the default selection. The Cloud Cost Management application uses the tag names and values that your cloud provider attaches to each billing line item. Tag categories are defined and managed in the Cloud Cost Management application.

CMDB-driven cloud mapping

Maps billing data to CMDB CI entities for cost attribution. This option requires that the selected tag names are present on billing line items from your cloud provider.

ServiceNow-managed dimensions

Uses the CI-to-application service mapping already defined in the CMDB. This option requires that CI-to-application service relationships are populated in your CMDB before you select it.

Related topics

- Select a tag category source
- Create and update a tag category
- Cost usage tags
- List of default tag categories

Configuring Cloud Cost Management

Plan and configure Cloud Cost Management to gain visibility into your total cloud consumption, reduce costs, and optimize the operations of your cloud platforms.

Configuration overview

Here's an overview of the process for configuring Cloud Cost Management.

Configure Cloud Cost Management

Step	Action	Resource
 Install Cloud Cost Management	Get the Cloud Cost Management application from the ServiceNow Store.	Install Cloud Cost Management
	Get the Cloud Cost Management Infra Stack application from the ServiceNow Store.	Install Cloud Cost Management Infra Stack

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure Cloud Cost Management (continued)

Step	Action	Resource
Install Cloud Cost Management Infra Stack	**Important:** The Cloud Cost Management Infra Stack application is available with Cloud Cost Management version 8.1 and later. Installing the Cloud Cost Management Infra Stack application is optional. However, if you have activated this application, you can't deactivate it later.	
 Assign roles	Assign Cloud Cost Management roles to user groups and to individual users based on user activities and responsibilities.	Cloud Cost Management roles
 Install MID Servers	Install the MID Servers to enable the movement of data between the Discovery application and your cloud platform.	Installing the MID Server
 Configure MID Servers	Configure the MID Servers for enabling the Discovery application to communicate with your cloud provider accounts.	• Configuring access to CI data on your AWS account • Configuring access to CI data on your Microsoft Azure account • Configuring access to CI data on your Google Cloud account
 Discover your cloud resources	Discover the service accounts, the credentials for accessing the accounts, and the MID Servers that scan the resources using one of the mentioned approaches.	• Using the Cloud Discovery application • Using the Service Graph Connectors

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure Cloud Cost Management (continued)

Step	Action	Resource
 Schedule and manage jobs to download billing data for Cloud Cost Management	Provide the Cloud Cost Management application access to the billing and usage data of the used cloud platforms.	• Set up access to AWS billing and usage data • Set up access to Microsoft Azure billing and usage data • Set up access to Google Cloud billing and usage data
 Schedule and manage jobs to download price sheets for Cloud Cost Management	Enable Cloud Cost Management to download and store price sheet data of the used cloud platforms.	• Schedule and manage the Cloud Cost Management jobs that download AWS price sheets • Schedule and manage the Cloud Cost Management jobs that download Microsoft Azure price sheets • Schedule and manage the Cloud Cost Management jobs that download Google Cloud price sheets
 Configure the Cloud Cost Management features	Configure the Cloud Cost Management features to rightsize, identify, assign, manage, and analyze usage data of your cloud resources.	• Commitments • Rightsizing resources • Unused resources • Business hours • Unassigned resources
 Use Cloud Cost Management	Gain visibility into your total cloud consumption, reduce costs, and optimize operations of your cloud platforms.	Using Cloud Cost Management

Install Cloud Cost Management

You can install the Cloud Cost Management application (sn_clin) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Cloud Cost Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Discovery (com.snc.discovery) and Discovery and Service Mapping Patterns (sn_itom_pattern) must be installed.

Role required: admin

About this task

The following items are installed with Cloud Cost Management:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Cloud Cost Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Cloud Cost Management application (sn_clin) 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.

   In the list next to the **Install** button, the versions that are available to you're 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. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

   Important:
   - If you don't load the demo data during installation, it's unavailable to load later.
   - If you install demo data, Cloud Cost Management features might not work properly.
6. Select **Install**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Install Cloud Cost Management Infra Stack

You can install the Cloud Cost Management Infra Stack application (sn_cld_infra_stack) if you have the admin role. The application includes related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

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

Role required: admin

About this task

The following items are installed with Cloud Cost Management Infra Stack:

- Plugins
- Store applications

The tables, scheduled jobs, and system properties aren't installed with the Cloud Cost Management Infra Stack application. Instead, the components specific to Cloud Cost Management Infra Stack are installed with the Cloud Cost Management application. For more information, see Components installed with Cloud Cost Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Cloud Cost Management Infra Stack application (sn_cld_infra_stack) 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 list next to the **Install** button displays the versions that are available to you.
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**.

Upgrade Cloud Cost Management

You upgrade Cloud Cost Management on the System Applications page.

Before you begin

Role required: sys_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **Installed**.
2. In the search box, enter `sn_clin`.
3. Find the **Cloud Cost Management** app.
4. In the selection list, select **Update** for version **11.0**.
   You can also update to the 11.0 version from 8.1 onwards.
5. When the update is complete, clear the browser cache.
6. Clear the server cache: `<instanceIP>/cache.do`

Configure a change creator user for Cloud Cost Management

Create and configure a change creator user so that the Cloud Cost Management application can create change requests on behalf of the insights_admin or insights_owner.

Before you begin

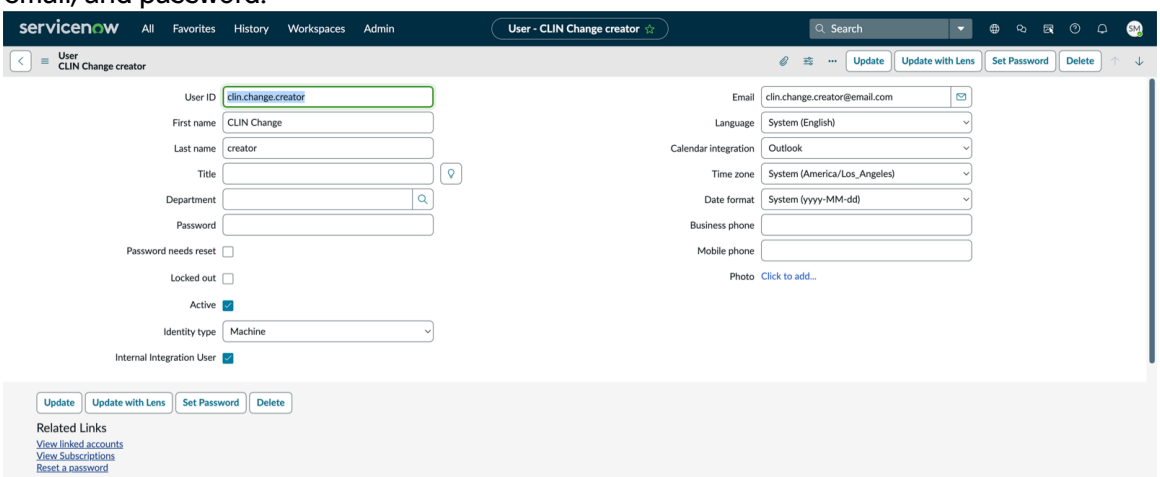
Role required: admin

About this task

A change creator user is configured as an internal integration user and should be assigned the sn_change_write role. With this role assignment, this change creator user can create change requests while scheduling recommendations for unused resources, business hours, and rightsizing.

Procedure

1. Create a ServiceNow user for internal use by navigating to **All** > **System Security** > **Users**.
2. Select **New**.
3. On the User form, fill in the required details for the user such as user ID, first name, last name, email, and password.



4. Select the **Internal Integration User** and **Web service access only** options.
   If you don't see the **Web service access only** option on the form, you can personalize and add it from the list view.
5. Select **Submit**.
   The user record is created.
6. Open the record and select the **Roles** tab.
7. Assign these roles to the internal user.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- `catalog`
- `rest_service`
- `sn_change_write`

8. Create a credential record for this user by navigating to **All** > **Http Basic Auth Credentials**.
9. On the Basic Auth Credentials page, select **New**.
10. On the Basic Auth Credentials form, provide the name, user name, and password in the respective fields.
    You must enter the same user name and password that you entered while creating the user.
11. In the **Credential alias** field, search for and select `sn_clin_core.clin_change_creator`.
    sn_clin_core.clin_change_creator is the default credential alias shipped with Cloud Cost Management.
12. Select **Submit**.
    The internal user is mapped to the default credential alias.

Configure Cloud Cost Management for AWS

The Cloud Cost Management application is available on the ServiceNow Store.

For more information, see Configuring Cloud Cost Management.

General requirements and limitations

- Cloud Cost Management isn't supported on mobile devices.
- Values in reports might vary slightly from provider billing values due to currency conversion or rounding.

Requirements and limitations for AWS

- You must have AWS administrator permissions to work in the AWS Management console.
- The Business hours, Unassigned resources, Unused resources, and Rightsizing recommendations features support Amazon Elastic Compute Cloud (EC2) virtual machine (VM), storage (volume and storage snapshots), and database resources.

Configuring access to CI data on your AWS account

To ensure secure and reliable communications, the Discovery process communicates with your cloud provider accounts and cloud resources through one or more MID Servers. You can set up the MID Servers on your network or in one of your cloud networks.

Requirements

Important: This configuration process applies only if you use the Discovery application to discover cloud resources. Skip this process if you use a different method for discovering resources.

AWS: There must be an internal network connection between the MID Servers and the AWS Cloud API endpoints: `*.amazonaws.com`.

Detailed instructions

See Setup AWS service accounts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

MID Server settings for Cloud Cost Management

Note: MID Server minimum memory size should be 4 GB.

Setting	Value
Supported Applications	Cloud Actions
Capabilities	The **ALL** setting includes all required applications and capabilities. Alternatively, you can specify the following settings: **Note:** You can specify the following settings for any number of MID Servers. If you specify multiple MID Servers, then Discovery, billing data download operations, and actions that are recommended by Cloud Cost Management are assigned to one of the MID Servers at random. Option 1: To use this MID Server only for AWS, specify both of the following values: • Cloud Actions • AWS Option 2: To use this MID Server for all providers, specify the following values: • Cloud Actions • AWS • Azure

Using a proxy server

You can use a proxy server for the Cloud Cost Management MID Server. See Proxy server configuration for your Cloud Cost Management MID Server.

Related topics

- MID Servers
- Install a MID Server on Windows
- Install a MID Server on Linux

Proxy server configuration for your Cloud Cost Management MID Server

You can configure any MID Server to use a proxy server for Cloud Cost Management operations. Proxy servers support all cloud-based activities such as running Discovery, Billing Download jobs, and Price Sheet Download jobs.

Detailed instructions

Proxy server configuration for MID Servers used for Cloud Discovery and Cloud Provisioning and Governance

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Proxy server limitations

- Only Windows or Linux platforms are supported.
- The Google Cloud integration is not supported.
- The VMware integration is not supported.
- Remote PowerShell scripts cannot be executed.
- Custom APIs might not work.

Supported proxy server authentication for Cloud Cost Management

Proxy Server type	Authentication type
HTTP/HTTPS	No authentication
SOCKS5	No authentication
HTTP/HTTPS	Basic authentication
SOCKS5	Basic authentication
HTTP/HTTPS	NTLM

Supported Proxy server configurations

Supported configuration settings

Configuration	Operating system	Proxy server	Authentication mode
Configuration 1	Linux	None	Not Applicable
Configuration 2	Windows	Squid (HTTPS)	None
Configuration 3	Linux	Squid (HTTPS)	Local
Configuration 4	Windows	Squid (HTTPS)	Active Directory

Related topics

MID Servers

Install a MID Server on Windows

Install a MID Server on Linux

Add an AWS service account

Add an AWS service account to store the credential and access information.

Before you begin

You must perform these tasks:

- Set up download jobs for billing and price sheet data for the service account.
- Configure the MID Server for AWS IAM role.
- Role required: discovery_admin or sn_cmp.cloud_admin

About this task

A service account is a secure record on your instance that stores the credential and access information for your provider account. Discovery uses the information to access your provider account to get data on each resource in each specified datacenter. A cloud account can include

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

multiple service accounts — even service accounts from different providers. For each service account, you specify which datacenters to include in the cloud account.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Service accounts**.
2. Select **New**.
3. On the Cloud Service Account form, fill in the fields.

Cloud Service Account form fields

Field	Description
Name	A unique and descriptive name for this service account.
Account Id	12-digit user account number. Expand the list under the AWS account name on the AWS Management Console to view the number. **Important:** Remove the hyphen characters (-) from the number.
Discovery credentials	The credentials needed for ServiceNow applications to access this account. You can configure this field at a later stage, while configuring access to AWS accounts. ○ If you configured AWS credentials at ServiceNow AI Platform, select the name of the relevant AWS credential. ○ To use other AWS accounts to access this account, leave the field empty. For example, you don't need to specify the AWS credentials for accounts assuming IAM roles or member accounts using their management account for access.
Datacenter URL	URL of the datacenter. This field is required only for AWS GovCloud (US) accounts. For example, `https://$service.us-gov-west-1.amazonaws.com/`.
Datacenter Type	Type of the datacenter where the account is hosted. Select **AWS datacenter**.
Datacenter discovery status	Status and timestamp of the last execution of Discovery on the datacenter. This value is generated automatically.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Is Billing Account	The option for enabling the account to access billing data.

4. Select **Save**.

Result
The service account that you created gets listed on the **Service accounts** page.

Related topics
Schedule and manage the jobs that download AWS billing data

Schedule and manage the Cloud Cost Management jobs that download AWS price sheets

Create an AWS IAM user policy for Cloud Cost Management
Create an Identity and Access Management (IAM) user profile that enables access to AWS data.

Before you begin
You must know how to create an IAM user and set up a user policy. See the AWS documentation on IAM for details.

Use an auto-generated access key. You need the key information when you configure AWS credentials in the instance.

Roles required:

- On the AWS Management Console: AWS Management Console administrator.
- Cloud Cost Management: admin.

About this task
The following procedure describes the process of creating an AWS IAM user policy and configuring credentials-based authentication for Cloud Cost Management. If you prefer to use Assume Role authentication, see Set up AWS Assume Role authentication for Cloud Cost Management.

Procedure
1. Log in to the AWS Management Console and create a user in IAM.
2. Save the Access Key ID and Secret Access Key.
3. Attach permissions to the IAM user using either of the following methods:
   - Grant administrator access to the user by attaching the Administrator Access policy.
   - Create an IAM policy with a descriptive name and use the following JSON for billing, cloud watch, forecast, and actions.

Operation	Policy
Billing	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Policy
	"Effect": "Allow", "Action": ["s3:GetObjectVersion", "s3:GetObjectTorrent", "s3:GetObject", "s3:ListBucket", "s3:GetObjectTagging", "s3:ListMultipartUploadParts", "s3:ListBucketMultipartUploads", "s3:GetObjectVersion"], "Resource": ["arn:aws:s3:::<S3BucketName>/*", "arn:aws:s3:*:<AWS Master Account ID>:job/*", "arn:aws:s3:::<S3BucketName>"] }, { "Sid": "VisualEditor1", "Effect": "Allow", "Action": ["s3:GetAccountPublicAccessBlock", "s3:ListAllMyBuckets", "s3:ListJobs"], "Resource": "*" }] }
Cloud watch	{ "Version": "2012-10-17",

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Policy
	"Statement": [{ "Sid": "VisualEditor0", "Effect": "Allow", "Action": ["cloudwatch:GetMetricData", "cloudwatch:ListMetrics"], "Resource": "*" }] }
Describe Report Definitions	{ "Version": "2012-10-17", "Statement": [{ "Sid": "VisualEditor0", "Effect": "Allow", "Action": "cur:DescribeReportDefinitions", "Resource": "<BillingReportName>" }] }
Actions	{ "Version": "2012-10-17", "Statement": [{ "Sid": "VisualEditor0", "Effect": "Allow", "Action": ["ec2:DescribeInstances", "ec2:StartInstances", "ec2:ModifyInstanceAttribute", "ec2:StopInstances", "ec2:DescribeInstanceStatus"],

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Policy
	<pre>"Resource": "*" }] }</pre>
AWS Cost Explorer, Forecast, and Reservation Purchase Recommendation APIs for the IAM user that you configure to access billing data on the Service account	<pre>{ "Version": "2012-10-17", "Statement": [{ "Sid": "VisualEditor0", "Effect": "Allow", "Action": ["ce:GetCostAndUsage", "ce:GetCostForecast", "ce:GetReservationPurchaseRecommendation"], "Resource": "*" }] }</pre>
AWS Auto-scale instances (Auto-scale instances aren't included in Business Hours recommendations)	<pre>{ "Version": "2012-10-17", "Statement": [{ "Sid": "VisualEditor0", "Effect": "Allow", "Action": ["autoscaling:DescribeAutoScalingInstances", "autoscaling:DescribeAutoScalingGroups"], "Resource": "*" }] }</pre>
AWS trusted advisor roles	<pre>{ "Version":"2012-10-17", "Statement": [{ "Effect": "Allow", "Action": [</pre>

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Policy
	<pre>"support:DescribeTrustedAdvisorCheckRefreshStatuses", "support:DescribeTrustedAdvisorCheckResult", "support:DescribeTrustedAdvisorChecks", "support:DescribeTrustedAdvisorCheckSummaries", "support:RefreshTrustedAdvisorCheck", "trustedadvisor:Describe*"], "Resource": "*" }] }</pre>

Set up AWS Assume Role authentication for Cloud Cost Management

Configure AWS Identity and Access Management (IAM) roles and permissions to enable Cloud Cost Management using Assume Role authentication.

Before you begin

Make sure you meet the following requirements before configuring the Assume Role authentication:

Prerequisites on AWS side:

- You have admin access to the AWS billing (master) account and all member accounts.
- If your accounts already use the *OrganizationAccountAccessRole*, no additional role configuration is required.
- If the *OrganizationAccountAccessRole* isn't present, you must create and attach the policies mentioned in the following procedure to the appropriate IAM roles in your master or member accounts.

Prerequisites on Cloud Cost Management side:

The billing (master) account is configured without a Discovery credential. It should instead be configured with an Accessor account. For details, see the knowledge base article KB0957891.

Note: If Discovery has already been configured using the Assume Role configuration, proceed without following the instructions in the knowledge article.

Roles required:

- On the AWS Management Console: AWS Management Console administrator.
- Cloud Cost Management: admin.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

When you configure AWS IAM roles and permissions using Assume Role authentication, the AWS Security Token Service (STS) issues temporary credentials. This enables cross-account access without long-lived credentials.

Procedure

1. Log in to the AWS Management Console for the master account.
2. Navigate to **Identity and Access Management (IAM)** > **Policies** > **Create Policy**.
3. Create an IAM policy with a descriptive name using either of the following methods:
   - Create multiple individual policies and attach them all to the assume role.
   - Create an inline policy that combines all the required statements and attach it to the assume role.

   You must replace `<S3BucketName>`, `<AWS Master Account ID>`, and `<BillingReportName>` with your actual values.

Operation	Policy
Billing **Note:** This policy should be applied only on the master account.	Grants access to the S3 bucket that stores AWS billing reports. For example, `CCM-BillingS3Access`. `{ "Version": "2012-10-17", "Statement": [{ "Sid": "BillingS3Access", "Effect": "Allow", "Action": ["s3:GetObjectVersion", "s3:GetObjectTorrent", "s3:GetObject", "s3:ListBucket", "s3:GetObjectTagging", "s3:ListMultipartUploadParts", "s3:ListBucketMultipartUploads"], "Resource": ["arn:aws:s3:::<S3BucketName>/*",`

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Policy
	<pre>"arn:aws:s3:*:<AWS Master Account ID>:job/*", "arn:aws:s3:::<S3BucketName>"] }, { "Sid": "BillingAccess", "Effect": "Allow", "Action": ["s3:GetAccountPublicAccessBlock", "s3:ListAllMyBuckets", "s3:ListJobs"], "Resource": "*" }] }</pre>
Cloud watch **Note:** This policy should be applied both on the master and member account.	Enables retrieving Cloud watch metrics for cost and usage monitoring. For example, `CCM-CloudWatchAccess`. <pre>{ "Version": "2012-10-17", "Statement": [{ "Sid": "CloudWatchMetricsAccess", "Effect": "Allow", "Action": ["cloudwatch:GetMetricData", "cloudwatch:ListMetrics"], "Resource": "*" }] }</pre>
Describe Report Definitions **Note:** This policy should be applied only on the master account.	Enables retrieving Cost and Usage Report (CUR) definitions. For example, `CCM-CURDefinitions`. <pre>{ "Version": "2012-10-17",</pre>

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Policy
	<pre>{ "Statement": [{ "Sid": "DescribeCURDefinitions", "Effect": "Allow", "Action": "cur:DescribeReportDefinitions", "Resource": "<BillingReportName>" }] }</pre>
EC2 Actions **Note:** This policy should be applied both on the master and member account.	Enables viewing and managing EC2 instances for rightsizing and cost optimization. For example, `CCM-EC2Actions`. <pre>{ "Version": "2012-10-17", "Statement": [{ "Sid": "EC2InstanceActions", "Effect": "Allow", "Action": ["ec2:DescribeInstances", "ec2:StartInstances", "ec2:ModifyInstanceAttribute", "ec2:StopInstances", "ec2:DescribeInstanceStatus"], "Resource": "*" }] }</pre>
AWS Cost Explorer, Forecast, and Recommendations **Note:** This policy should be applied both on the master and member account.	Grants access to#AWS Cost Explorer, #Cost Forecast, and#Reservation Purchase Recommendation#APIs. For example, `CCM-CostExplorerAccess`. <pre>{ "Version": "2012-10-17", "Statement": [</pre>

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Policy
	<pre>{ "Sid": "CostExplorerAccess", "Effect": "Allow", "Action": ["ce:GetCostAndUsage", "ce:GetCostForecast"], "Resource": "*" }] }</pre>
Auto Scaling **Note:** ○ Auto Scaling instances aren't included#n Business Hours recommendations. ○ This policy should be applied both on the master and member account.	Enables retrieving Auto Scaling instance details. For example, `CCM-AutoScalingAccess`. <pre>{ "Version": "2012-10-17", "Statement": [{ "Sid": "AutoScalingDescribeAccess", "Effect": "Allow", "Action": ["autoscaling:DescribeAutoScalingInstances", "autoscaling:DescribeAutoScalingGroups"], "Resource": "*" }] }</pre>
Trusted Advisor and Reservation Purchase Recommendation#APIs **Note:** This policy should be applied both on the master and member account.	Grants access to Trusted Advisor checks and Reservation Purchase Recommendations to support cost optimization insights. For example, `CCM-TrustedAdvisorAccess`. <pre>{ "Version":"2012-10-17", "Statement": [{ "Sid": "RecommendationsAccess", "Effect": "Allow", "Action": [</pre>

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operation	Policy
	"support:DescribeTrustedAdvisorCheckRefreshStatuses", "support:DescribeTrustedAdvisorCheckResult", "support:DescribeTrustedAdvisorChecks", "support:DescribeTrustedAdvisorCheckSummaries", "support:RefreshTrustedAdvisorCheck", "trustedadvisor:Describe*", "ce:GetReservationPurchaseRecommendation"], "Resource": "*" }] }

4. Attach policies to the IAM role used for Assume Role authentication.

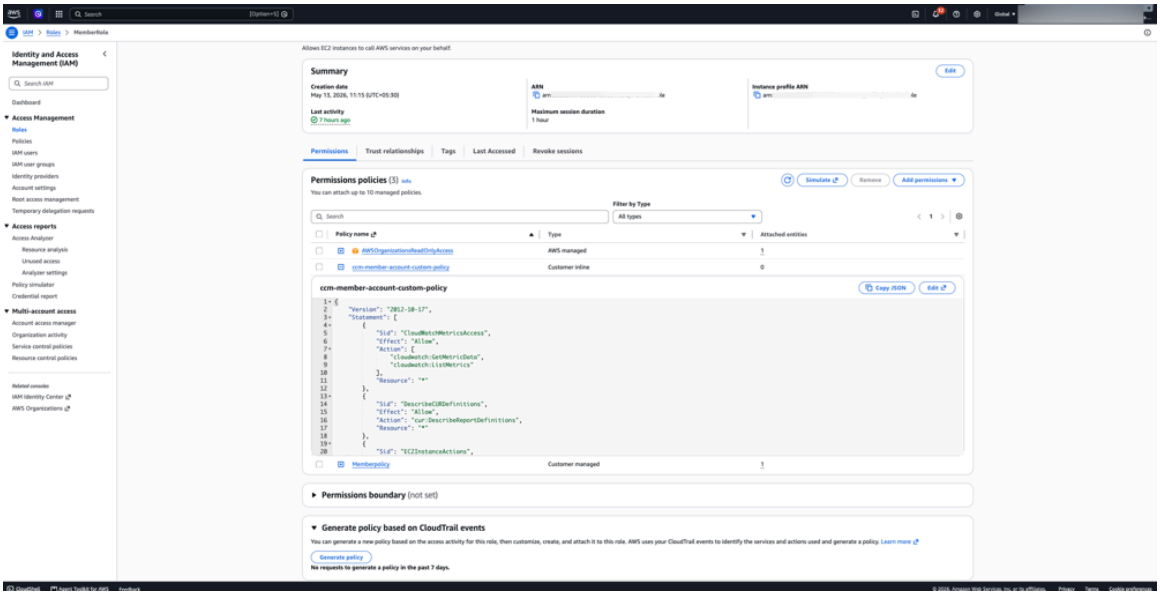
   a. Navigate to **Identity and Access Management (IAM)** > **Roles** and locate the role designated for Cloud Cost Management access.
   For example, *OrganizationAccountAccessRole*.

   b. Select **Permissions** and then select **Attach policies**.

   c. Search for and select the policy that you created in step 4.

   d. Select **Add permissions** to confirm.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



5. Grant permission to assume the role.

   a. Navigate to **Roles** and open the *OrganizationAccountAccessRole* that you created in step 4.

   b. Select the **Trust relationships** tab and then select **Edit trust policy**.

   c. Verify that the principal is listed.
   For example, trust relationship on member account

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Effect": "Allow",
            "Principal": {
                "Service": "ec2.amazonaws.com"
            },
            "Action": "sts:AssumeRole"
        }
    ]
    }
```

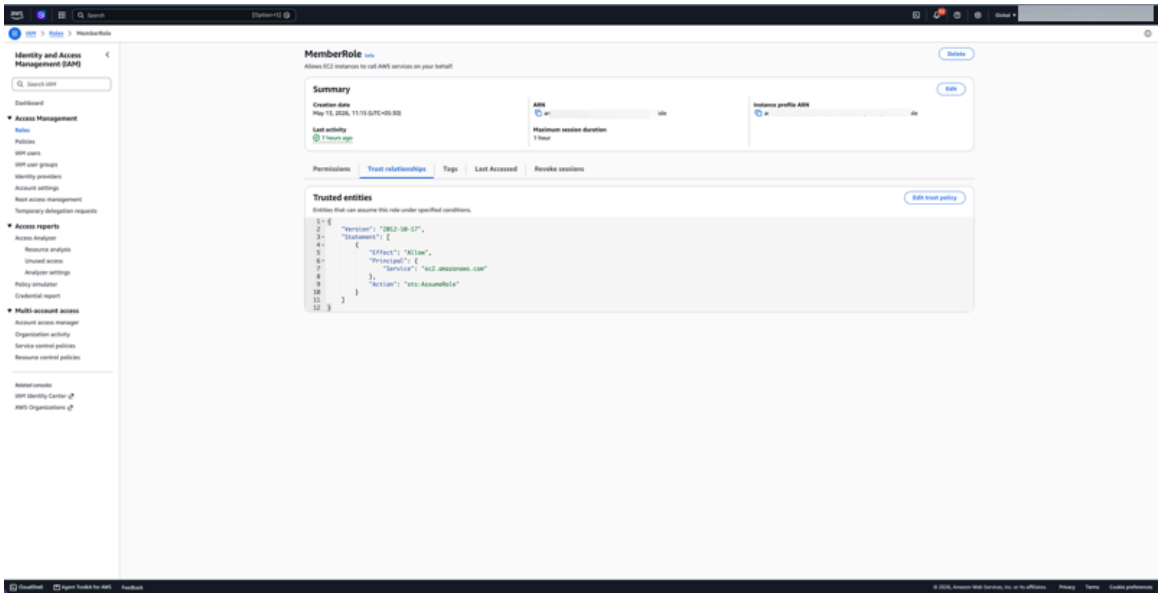
   For example, trust relationship on master account

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Effect": "Allow",
            "Principal": {
                "AWS":
 "arn:aws:iam::<<member-account-number>>:role/<<assume-role-c
reated-in-member-account>>"
            },
            "Action": "sts:AssumeRole",
            "Condition": {}
        }
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
        ]
}
```

d. Select **Update policy**.



Result

After the policies are attached to the Assume Role, Cloud Cost Management can authenticate your AWS accounts using Assume Role and access billing, cost, and resource data.

Add an AWS GovCloud service account

If your organization uses AWS GovCloud (US) regions, you create a service account for each region. The credentials that you create during the service account creation, are used for Cloud Discovery and Cloud Cost Management.

Before you begin

Role required: sn_cmp.cloud_admin

- AWS GovCloud (US) credentials for each GovCloud region.
- AWS GovCloud (US) account ID (from the AWS Management Console).

About this task

A service account holds the credential and account information that you created in your provider account. A cloud_admin can add an AWS GovCloud service account. Be sure to set up download jobs for billing and price sheet data for the service account.

Procedure

1. Navigate to *`Cloud Cost Management Workspace`* > **Operations** > **Administration** > **Service accounts**.
2. Select **New**.
3. On the Cloud Service Account form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cloud Service Account form fields

Field	Description
Name	A unique and descriptive name for the service account. For example, `AWS GovCloud SA 01`.
Account Id	Account ID to which this credential belongs.
Discovery credentials	Name of the credentials that you created in the Create an AWS IAM user policy for Cloud Cost Management procedure.
Datacenter URL	URL of the datacenter. For example, https://ec2.us-gov-west-1.amazonaws.com
Datacenter Type	Type of the datacenter where the account is hosted. Select **AWS datacenter**.
Datacenter discovery status	Status and timestamp of the last execution of the Discovery application on the datacenter.
Is Billing Account	The option for enabling the account to access billing data.

4. Select **Save**.

Result
The service account gets created and displays the list of all discovered datacenters.

Related topics
Schedule and manage the jobs that download AWS billing data

Schedule and manage the Cloud Cost Management jobs that download AWS price sheets

Create AWS Gov accounts mapping

Create an AWS GovCloud account mapping with an associated standard AWS account to enable Cloud Cost Management to consolidate usage data and provide accurate cost recommendations across your government cloud environment.

Before you begin
Make sure you meet the following requirements:

- Verify that the AWS GovCloud account has already been created within Cloud Cost Management.
- Verify that the standard AWS account to be linked is active and has billing permissions configured.

Role required: sn_cmp.cloud_admin

About this task
AWS GovCloud accounts are separate from standard AWS accounts and can't be used directly for billing or support. Creating a mapping links a GovCloud account to its associated standard AWS account and provides access to billing data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > *AWS* **Gov account mappings**.
2. Select **New**.
3. On the AWS Gov Accounts Mapping form, fill in the fields.

AWS Gov Accounts Mapping

Field	Description
Gov account	The AWS Gov account that you want to map to the standard AWS account.
Linked account	Standard AWS account that you want to link to the AWS Gov account. This account must already exist in your Cloud Cost Management configuration.

4. Select **Save**.

Result
The mapping you created gets displayed on the AWS Gov account mapping page with details such as Sys ID, tags.

Set up access to AWS billing and usage data

Set up access to AWS billing and usage data by following the steps.

1. Create AWS credentials
2. Create a record of AWS credentials in Cloud Cost Management
3. Enable cost allocation in AWS for Kubernetes cluster
4. Schedule and manage the jobs that download AWS billing data
5. Add an AWS CI class type for billing data accuracy

Related topics

Cancel an AWS Billing download job

Create AWS credentials

Create credentials in the AWS Management Console to specify the credentials of the user when you configure the MID Servers that communicate with your AWS account.

Before you begin
Role required: AWS Management Console administrator

You should be familiar with AWS policies. If you use IAM, you must know how to create an IAM user and set up a user policy. For more information about IAM, see AWS documentation.

Procedure

1. On the AWS Management Console, enter IAM in the AWS services search box to open the Identity and Access Managements (IAM) service.
2. On the IAM Resources portal, select **Users**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select **Add user**.
4. On the Details page, configure the user settings as shown and then select **Next**.

Field	Value
User name	Name for the programmatic user, for example, `servicenowcloud`.
Access type	`Programmatic access`.

5. On the Permissions page, configure the following settings and then select **Next**.

Field	Value
Set permissions for <username>	Attach existing policies directly.
Attach one or more policies	The appropriate policy. **Note:** The AdministratorAccess policy has the most powerful permission level, including permission to provision cloud resources. You might instead prefer to create a policy or combine multiple policies to grant the appropriate permission level. For more information, see Create an AWS IAM user policy for Cloud Cost Management.

6. On the Review page, verify your selections and then select **Create user**.
7. On the Complete page, select **Download .csv** to save a CSV backup file that contains the username, Access key ID, and the Secret access key value.
You can create the file as a backup in case that you lose those values. Verify that the file was created and then store the file securely.

What to do next
Create a record of the AWS credentials in Cloud Cost Management.

Create a record of AWS credentials in Cloud Cost Management

Create a record of the AWS credentials in Cloud Cost Management.

Before you begin
Role required: admin

Procedure

1. Navigate to **Cloud Cost Management Workspace** > **Operations** > **Administration** > **Credentials**.
2. On the Cloud API credentials page, select **AWS credentials**.
3. Select **New**.
4. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AWS Credentials

Field	Description
Name	Unique and descriptive name for the AWS credentials.
Active	Option to use the credential.
Access Key ID	The Access key ID that you generated on the AWS Management Console.
Secret Access Key	The Secret access key that you generated on the AWS Management Console.

5. Select **Save**.

Enable cost allocation in AWS for Kubernetes cluster

Enable cost allocation for a Kubernetes cluster in AWS Management Console before you run a AWS Billing download job to view the Kubernetes spend.

Before you begin

Role required: AWS Management Console administrator

- You should be familiar with AWS policies.
- Install Discovery and Service Mapping Patterns application (sn_itom_pattern) 1.10.2 or higher. For more information, see Install Discovery and Service Mapping Patterns.
- Install CMDB CI Class Models (sn_cmdb_ci_class) version 1.53.1 or higher. For more information, see CMDB CI Class Models app.
- To set up Kubernetes discovery, see Kubernetes discovery using patterns.

Procedure

1. Log in to the AWS Management Console.
2. Search for and select **Cost Allocation Tags**.
3. Select the **User-defined cost allocation tags** tab.
4. Activate the following Kubernetes tags to appear in the billing data:
   - Static Tag key
     - aws:eks:cluster-name
     - user:eks:cluster-name
     - eks:cluster-name
   - Dynamic Tag key
     - kubernetes.io/cluster/<Cluster-Name>: shared/owned
     - alpha.eksctl.io/cluster-name: <Cluster-Name>

Result

The cost allocation for the selected Kubernetes cluster is enabled and you can view the Kubernetes spend.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Schedule and manage the jobs that download AWS billing data

Billing Download jobs download, organize, and store billing data for your payer account on the schedule that you specify. The system analyzes the data to generate reports and to make recommendations for changes in your cloud operations that can lead to cost savings.

Before you begin

Role required: Cloud Integrations Admin [sn_cld_intg_core.cloud_integrations_admin]

Ensure that your system has 8 GB Clotho memory and 4 GB mid memory.

Enable cost allocation for each Kubernetes cluster before you run an AWS Billing download job to view the Kubernetes spend. For more information, see Enable cost allocation in AWS for Kubernetes cluster.

About this task

During billing download, all the resources are pulled into the system. AWS Redshift resources are placed in the [cmdb_ci_cloud_database] table. After the 4.0 upgrade, make sure that the billing download is executed with reimport true.

Note: From Cloud Cost Management version 8.1 onwards, the default time for billing download jobs has changed from 12:00 to 01:00 (UTC). Also, schedule or run Cloud Cost Management jobs only during off-business hours and when there's no other heavy operations or jobs running on the ServiceNow instance.

If you have installed the Cloud Cost Management Infra Stack application, then toward the end of a job, significant database update, and insert operations are performed based on your Cloud CIs and spend data volume. Thus, any other job that impacts database performance shouldn't be run during this time alongside Cloud Cost Management jobs.

- Billing Download jobs can't be in the Global scope.
- If the Cloud Provisioning and Governance application is installed on your instance: Both Cloud Provisioning and Governance and Cloud Cost Management download billing data. The two download jobs are separate processes and they don't interfere with each other.
- You can create only one Billing Download job for each account (enrollment).
- Configure AWS Billing download for the main account otherwise the spend doesn't generate.
- To ensure accurate reporting and recommendations for some providers, make sure that the Discovery application runs before the scheduled execution.
- Each successful execution of a Billing Download job triggers the Budget Forecast, Business hours, Commitments, Rightsizing, and Unused resources jobs to analyze spend and usage data and to update the actionable recommendations in reports.
- Each successful execution of a Billing Download job updates tagged costs. Recent updates that you make to tag category definitions (for example, adding a tag name to a category) might not be reflected in cost reports. You should map tag values to tag categories after the first run because populating tag values needs at least one successful run. You can apply the latest tag category definitions to cost data without running a Billing Download job, by selecting *Cloud Cost Management Workspace* > **Operations** > **Cost usage tags** > **Tag categories** and then selecting **Re-Apply Categories**.
- When the scheduled time arrives, job execution happens in multiple stages (for example, connect to the provider, download the data, perform the post-import sort, and so on). The system logs status and results on the Price Sheet Executions page for each stage.
- All user-defined tags for cost allocation are assigned the prefix `user:` from AWS while all AWS-generated tag names are automatically assigned the prefix `aws:`. For example, if the tag name is `owner`, in the billing data it is displayed as `user:owner`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Cost categories are updated with new cost tag values each time billing data is downloaded. (You define cost tags in the provider portal to associate usage data with a particular business entity. For example, the Cost Center category might include the tags `development`, `testing`, and QA. The User category might include the names of your users.)
- Billing data is downloaded in reverse chronological order by month. For example, if the range is from March to June, data for June is downloaded first.
- To ensure meaningful results for the first billing data download, the app downloads data for at least 30 days. For example, if today is June 10 and you specify June for download, the system downloads data for both May and June to ensure at least 30 days of data for analysis.
- You can download data only for the most recent twelve months.

For AWS.

- You can create only one Billing Download job for each service account.
- Only costs of the unblended type are supported.
- The Billing Download job updates the billing node data table [sn_cld_intg_aws_cost_usage] with the CIs in the CMDB that correspond to each resource ID.
- The CI placement process associates downloaded cost and usage data with the appropriate CIs in the CMDB. See Add an AWS CI class type for billing data accuracy for the details.

Procedure

1. Review the settings to verify that the settings on the report meet the requirements for Cloud Cost Management when you have an existing AWS Cost and Usage Report (CUR).
2. On the AWS Management Console, define an AWS CUR as follows:

   Note: You must configure Legacy CUR because the Cloud Cost Management application supports the legacy version only.

   a. Follow the instructions in the Creating Cost and Usage Reports topic and use the following settings:
      - Select the **Include resource IDs** check box.
      - Select the **Automatically refresh your Cost and Usage Report when** check box.
      - Report path prefix: optional
      - Set **Time granularity** to either **Daily** or **Hourly** as needed. The **Hourly** setting generates a larger, more granular data set.
      - Set **Report versioning** to **Create new report version**.
      - Set **Compression type** to **GZIP** or **ZIP**. Cloud Cost Management doesn't support Parquet.

   b. Track the following values because you enter them into a Cloud Cost Management form in a moment.
      - Report name
      - Report prefix
      - Name of the S3 bucket that is the data storage area for the daily detailed billing records on the AWS account.

3. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Billing download jobs**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Select the **AWS** tab.
5. Select **New**.
6. On the form, fill in the fields:

AWS Billing Download Job

Field	Description
Name	Meaningful name for the scheduled execution of the Billing Download job.
Last successful execution	The timestamp of the most recent successful execution.
Notify users/groups	The users or groups to be notified by email about the status of the job execution (for example, download failure). The system doesn't send a notification for success. Users or groups with the Cloud Integrations Admin [sn_cld_intg_core.cloud_integrations_admin] role are well suited to handle these issues. To update the email template, navigate to **System Notification** > **Email** > **Notifications** and open the Notify on billing job execution error template. For information on configuring the email, see Create an email template.
Active	Option for activating the job. Only active jobs are executed.
Run	Frequency with which to execute the Billing Download job. **Note:** ○ For AWS, Billing Download jobs collect data once per day, even if AWS collects hourly usage data. ○ Depending on the value that you select, additional fields appear. This field is automatically set to **Daily**.
Time	Time of day to execute the job.
Latest execution status	The status of the most recently executed job.
Latest execution details	Execution details of the most recently executed job.
AWS Settings	
Service account	The AWS service account.
Bucket	Amazon S3 bucket that is the data storage area for the detailed hourly billing records on the AWS account.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Report name	The report-name value that appears in your AWS Cost and Usage Report.
Report prefix	The `report-prefix` value that appears in your AWS Cost and Usage Report.

7. Select **Save**.
8. On the **Billing download jobs** page, select the created job.
9. Select **Test connection**.

   The Test Connection workflow uses the settings that you configured to attempt to access the provider account. The system displays a progress pop-up and a success/error message that suggests actions to fix the configured settings.
10. Select **Execute now** to execute the job after the connection succeeds.
11. In the **Download billing data** dialog box, fill in the fields.

Field	Description
Start month	Starting month for downloading the billing data. **Note:** Data is downloaded for the specified months. If fewer than 30 days of data for analysis is received, data for the preceding month is also downloaded.
End month	Ending month for downloading the billing data.
Re-import data	Option for overwriting data from an earlier download attempt.

12. Select **Download**.
    An AWS billing download job goes through the following states during the job execution:
    a. **Ready**: The job is in the queue. For example, when a job is created to download billing data for a few months, the jobs for all months except the latest month are in Ready state.
    b. **Requested**: The job is fetched and processed immediately. For example, the job that's created to download billing data for a month is in the Requested state. Also, when a job is created to download billing data for more than a month, the latest month job is also in the Requested state.

       Note: If you have installed the Cloud Cost Management Infra Stack application, it takes some time for the job to change from Ready to Requested state for AWS billing download job with Assume role authentication. This is because it takes time for the files to be downloaded to Cloud Cost Management MID Server. For details, see Processing AWS billing jobs with Assume role authentication.

    c. **Reserved**: Job is picked by the Kubernetes cluster for processing. The Kubernetes cluster also sends the Job Id to Cloud Cost Management Glide to show which Kubernetes job is processing the billing job.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

d. **In Progress**: Billing data is being processed.

e. **Sink Begin**: Kubernetes cluster sends some part of the processed billing data to the tables such as Spend Report Daily Aggregate Cost and Spend Report Monthly Aggregate Cost on Cloud Cost Management Glide. The records in these tables are in the Generating state. The job remains in the Sink Begin state until the entire billing data is sent to Cloud Cost Management Glide.

   In the Sink Begin state, the CI placement also starts and the Status of the CI Placement Stage changes from Ready to In Progress.

   Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

f. **Sink Complete**: All the processed billing data is sent to Cloud Cost Management Glide from the Kubernetes cluster.

   Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

g. **Finished**: Status after Sink Complete when all the billing files are sent to the Glide database.

   Note: The following changes happen when the job is marked Finished:

   - The state of the records in the Spend Report Daily Aggregate Cost and Spend Report Monthly Aggregate Cost tables change from Generating to Active. Also, existing records are marked inactive.
   - The billing account for which the billing file was downloaded is automatically set as a Master account in the Service Accounts table.

h. **Success**: Job is completed successfully.

Result

The following events happen when the job executes:

- While downloading the data, Cloud Cost Management updates the billing node data table [sn_cld_intg_<provider>_cost_usage] with the CIs in the CMDB that correspond to each resource ID. If a CI doesn't exist, the system generates a placeholder CI. On subsequent discovery, the system reconciles the placeholder CI.
- Cloud Cost Management generates a log entry for each stage of the execution on the Billing Download Executions page.

Add an AWS CI class type for billing data accuracy

Specify the details of a new CI or CI type to enable the CI placement process to assign cost and usage data correctly. The process is a part of Billing Download job execution. The CI placement process associates downloaded cost and usage data with the appropriate CIs.

Before you begin

Role required: Cloud Insights Admin [sn_clin_core.insights_admin]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Billing Download jobs store downloaded billing data in the billing node table. The Class Type table holds CI type definitions for the cost usage table. Cloud Cost Management executes the CI placement process to associate the billing and usage data with CIs in the CMDB. The CI placement process queries the billing node table using the CI type definitions that reside in the CI placement type table. For a new CI (or a CI type from a new provider), you specify the parameters that uniquely define the CI, a CI type definition, and a class type table to store the CI type definition.

Important: If the Cloud Cost Management Infra Stack application is installed, you can't add a new AWS CI class type. However, you can use the existing CI class types.

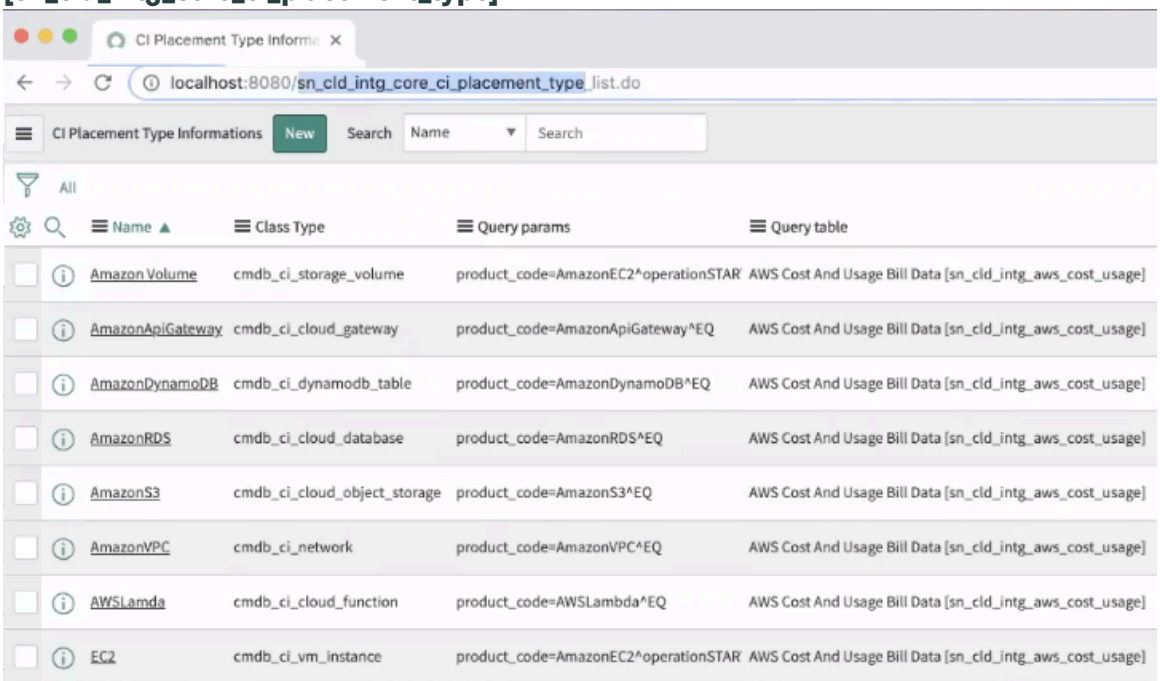
The CI placement type table for AWS [sn_cld_intg_aws_ci_placement_type] inherits from the Core CI placement type table (sn_cld_intg_core_ci_placement_type).

Important: If the Discovery patterns application is not installed, then CIs in the following class types are not placed: cmdb_ci_cloud_gateway, cmdb_ci_dynamodb_table, cmdb_ci_cloud_object_storage, and cmdb_ci_cloud_function.

Procedure

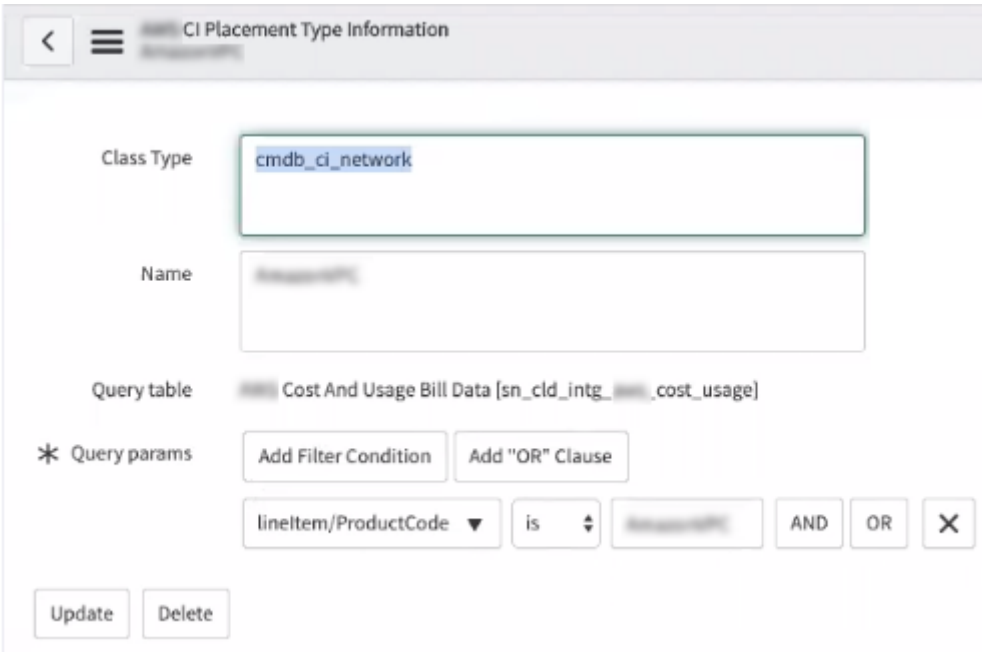
1. Go to the CI placement type table and select **New**.

AWS class types in the Core CI placement type table [sn_cld_intg_core_ci_placement_type]



2. Fill in the form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



CI Placement Type Information form

Field	Description
Class type	CMDB class type table that this type of CI is stored in. New CIs of this type are added to the table.
Name	Name of the CI type.
Query table	Billing node table that the CI placement process queries to find instances of the CI type. The Query table is sn_cld_aws_cost_usage and cannot be changed.
Query params	Parameter values in the billing node table that uniquely define the CI type.

3. After you add a class type, you must reimport billing and usage data to ensure that CIs are correctly placed into the new type.
   See Schedule and manage the jobs that download AWS billing data.

   Note: The supported CIs are placed after the Cumulus Unsupported CI Placement scheduled job runs daily. For more information, see Supported CI class types for Amazon AWS Cloud services.

Cancel an AWS Billing download job

A Billing download job obtains billing and usage data from each payer account for AWS. The Rightsizing, Unused resources, and Business hours processes use billing and usage data when generating recommendations. You can cancel any Billing download job individually.

Before you begin
Role required: Cloud Integrations Admin [sn_cld_intg_core.cloud_integrations_admin]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Billing download jobs**.
2. Select the **AWS** tab.
3. Select either a currently running or scheduled job that you want to cancel.
4. On the AWS Billing Download page, select **Cancel execution**.

Processing AWS billing jobs with Assume role authentication

Use the Cloud Cost Management Infra Stack application to process and download the AWS billing files with Assume role authentication at a better speed.

When you have installed the Cloud Cost Management Infra Stack application, the processing of all billing download jobs happens completely on the Kubernetes cluster. However, for AWS billing jobs with Assume role authentication the processing of billing data is partially done via Cloud Cost Management MID Server.

To configure AWS IAM roles and permissions using Assume Role authentication, see Set up AWS Assume Role authentication for Cloud Cost Management.

AWS billing download job (with Assume role) workflow

1. The Cloud Cost Management MID Server connects to AWS and downloads the billing data files.
2. The billing data files are sent to Cloud Cost Management Glide as an attachment.

   Note: If the default configuration for maximum attachment size is changed and it's less than the billing data file, it might have an impact on billing. To keep the default configuration or a value higher than the billing file size, see the knowledge base article KB0718101.

3. The attachments are stored temporarily in the Attachment table in the Glide database.
4. After all the attachments are stored in the Glide database, the Kubernetes job fetches details of the billing download jobs that are in the Requested state.

   Note: The temporary attachments are deleted from the Glide database after the billing job is completed.

5. Kubernetes job fetches the attachment files from the Glide database via an API and processes the files on the Kubernetes cluster.
6. The processed billing data is sent to Glide and finally stored in the Glide database.

For AWS Assume Role Billing Download, the Flow Launcher Job Configuration settings determine the parallel processing of multiple download threads. These settings are stored in the AWS Assume Role Billing Download record in the Flow Launcher Job Configuration [sn_cld_intg_core_flow_launcher_job_config] table. The value in the Concurrency field of the AWS Assume Role Billing Download record is the number of billing files downloaded in parallel. Performance is optimal when the Concurrency field is set to the default value 2. However, if you experience any slowness, you can set the **Concurrency** field to **1** with the admin role.

Schedule and manage the Cloud Cost Management jobs that download AWS price sheets

A Price Sheet Download job downloads and stores price sheet data. The Rightsizing and Unused resources processes use price sheet data when generating recommendations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

For each provider, run Discovery on each service account.

Role required: insights_admin [sn_clin_core.insights_admin].

About this task

- You create a scheduled Price Sheet Download job for AWS.
- Each execution of a Price Sheet Download job runs multiple execution items. Each execution item imports and stores the price sheet for one region.
- To ensure accurate reporting and recommendations for some providers, make sure that the Discovery application runs before the scheduled execution.
- When the scheduled time arrives, job execution happens in multiple stages (for example, connect to the provider, download the data, perform the post-import sort, and so on). The system logs status and results on the Price Sheet Executions page for each stage.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Price sheet download jobs**.
2. Select **New**.
3. On the form, fill in the fields.

Price Sheet Download Job form fields

Field	Description
Name	A unique and meaningful name for the Price Sheet Download job.
Provider	Name of the cloud provider.
Last successful execution	Timestamp of the most recent execution of the job.
Download Price Sheet For	Price sheet downloads for different services. ○ Compute and Storage ○ Database ○ All
Active	Option for activating the Price Sheet Download Job. Only active jobs are executed.
Run	Frequency to execute the job. **Note:** Depending on the value that you select, additional fields appear. For example, if you select a **Run** value of **Monthly**, a **Day** field appears. A value of 3 would mean the third day of the month. This field is automatically set to **Monthly**.
Time	Time of day to execute the job.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Current execution status	Status of the execution that is currently running.
Current execution details	Details for the execution that is currently running.

4. Select **Save**.
5. Select **Execute** to execute the job.
   During execution, Cloud Cost Management downloads and stores the data. You can find the execution ID, status, and execution logs in the **Price Sheet Executions** tab. If there's no new data, the execution is marked **Skipped**. If the download process is stuck, the execution is marked as **Canceled**.

Related topics

Rightsizing resources

Specify rate discounts to enable accurate pricing for Rightsizing recommendations

Cancel an AWS Price sheet download job in Cloud Cost Management

An AWS Price sheet download job downloads price sheet data from AWS. You can cancel any Price sheet download job individually.

Before you begin

For each provider, run Discovery on each service account.

Make sure to have the proper credentials and service account setup.

Role required: insights_admin [sn_clin_core.insights_admin].

About this task

Cloud Cost Management downloads price sheet data from each provider one region at a time. If you cancel a running price sheet download job, the current region finishes downloading and the system cancels download for the remaining regions. If you delete a scheduled job execution, then all regions are marked as canceled.

Procedure

1. Navigate to *`Cloud Cost Management Workspace`* > **Operations** > **Administration** > **Price sheet download jobs**.
2. Select either a currently running or scheduled job that you want to cancel.
3. On the Price Sheet Download job page, select **Cancel execution**.

Configure Cloud Cost Management for Microsoft Azure

The Cloud Cost Management application is available on the ServiceNow Store.

General requirements and limitations

- Cloud Cost Management isn't supported on mobile devices.
- Values in reports might vary slightly from provider billing values due to currency conversion or rounding.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Requirements and limitations for Microsoft Azure

You must have Microsoft Azure console administrator permissions to work in the Microsoft Azure console

Download and activate Cloud Cost Management

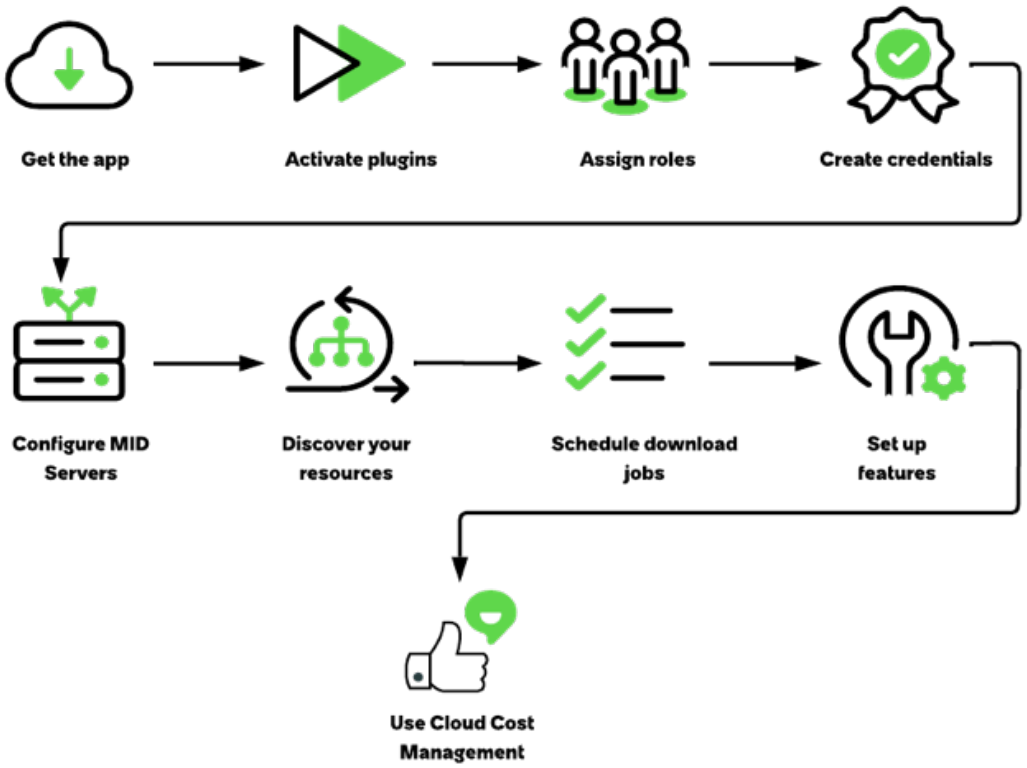
Role required: sys_admin

Step	Description	Action
 Get the app.	Get the Cloud Cost Management app from the ServiceNow Store.	Visit the ServiceNow Store website to get the Cloud Cost Management app and supporting apps.
 Activate all supporting plugins and applications.	Activate the plugins listed on the ServiceNow Store page for Cloud Cost Management. You might need to request some of the plugins from your ServiceNow representative.	For instructions, see: • Request as plugin • Activate a plugin

Overview: Setting up Cloud Cost Management

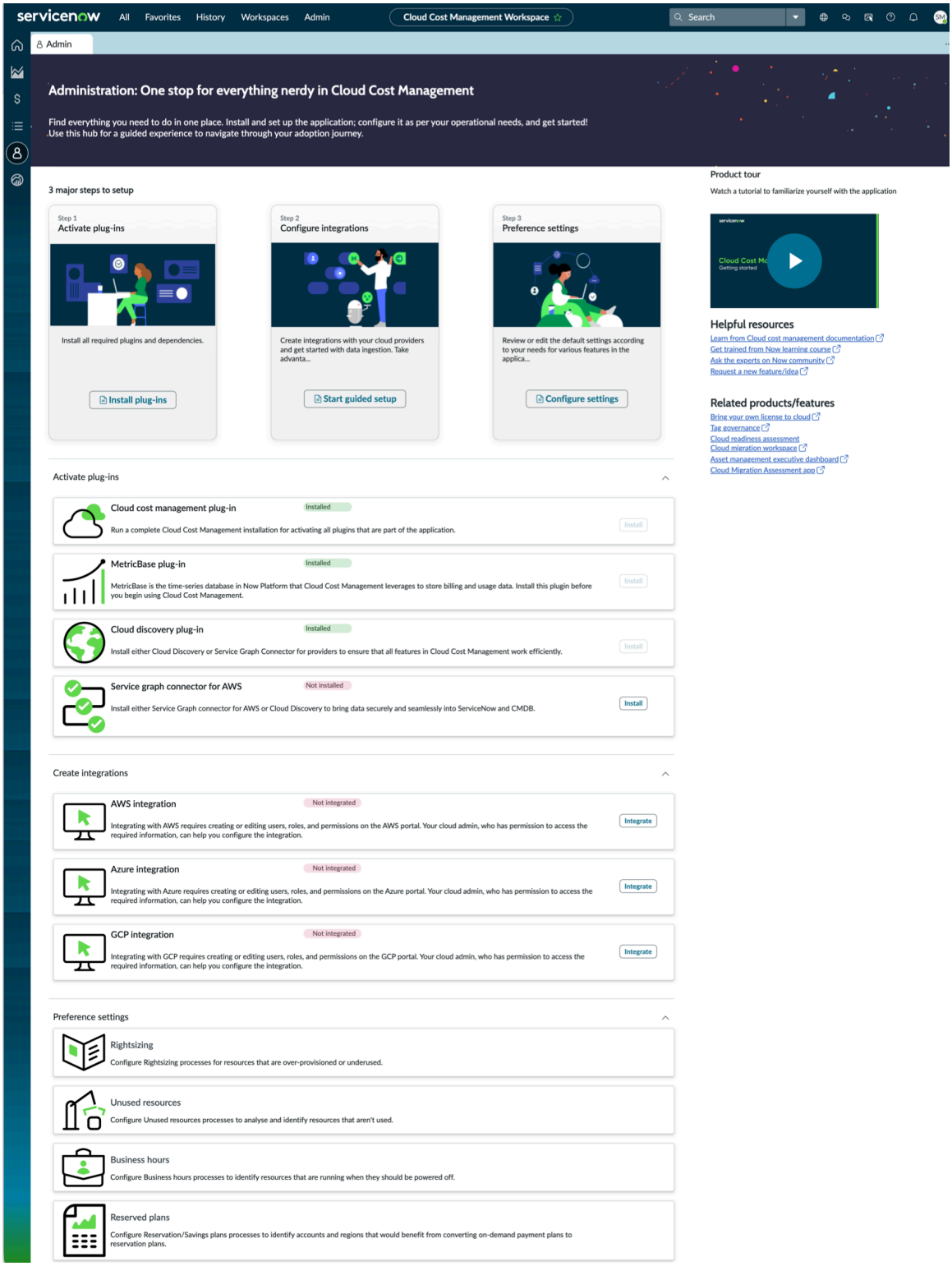
Here's an overview of your set up process. Detailed instructions appear in the table that follows.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Navigate to **Workspaces** > **Cloud Cost Management Workspace** > **Admin**. The Admin page enables you to set up a provider and preferences.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Setting up Cloud Cost Management

Step	Description	Action
	You assign Cloud Cost Management roles to user groups and to individual users based on user activities and responsibilities.	Cloud Cost Management roles

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Step	Description	Action
Assign roles to Cloud Cost Management users and groups.		
 Configuring MID Servers to access CI data on provider accounts for Cloud Cost Management.	To enable Discovery to communicate with your Microsoft Azure account, you specify your Service Principal credentials while configuring the MID Servers that communicate with your Microsoft Azure account.	Configuring access to CI data on your Microsoft Azure account
 Discover your cloud resources.	You schedule the Discovery process to ensure that the CMDB data on resources remains current.	Discovering your cloud resources for use
 Schedule and manage the jobs that download billing data for Cloud Cost Management.	Billing Download jobs download, organize, and store billing data for your payer account on the schedule that you specify. The system analyzes the data to generate reports and to make recommendations for changes in your cloud operations that can lead to cost savings.	Set up access to Microsoft Azure billing and usage data
 Schedule and manage the Cloud Cost Management jobs that download price sheets.	A Price Sheet Download job downloads and stores price sheet data. The Rightsizing and Unused resources processes use price sheet data when generating recommendations.	Schedule and manage the Cloud Cost Management jobs that download Microsoft Azure price sheets

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Step	Description	Action
 Configure the Cloud Cost Management features: • Rightsizing • Unused Machines • Business Hours • Unassigned Resources	• The Rightsizing feature analyzes resource usage to recommend better sizes for resources that are wasting money by being over-provisioned or underused. A confidence rating and predicted savings support each recommendation. You schedule Rightsizing jobs to resize the resources you specify. • The Unused Machines feature analyzes usage data to identify resources that are wasting money because they aren't used. You schedule Unused Machines jobs to power-off or terminate the resources that you specify. • A Business Hours job applies policies to identify resources that are running when they should be powered off, reports them, and can start and stop them on a schedule that you specify. Running only during specified business hours can significantly reduce your cloud spend. • Unassigned Resources policies help you to identify the resources that aren't associated with a change group and to assign them appropriately. When a resource is assigned to the correct group, the resource can be appropriately governed even as it goes through stages such as patching, upgrading, and reconfiguring.	• Rightsizing resources • Unused resources • Business hours • Unassigned resources

Configuring access to CI data on your Microsoft Azure account

To enable Discovery to communicate with your Microsoft Azure account, you specify your Service Principal credentials while configuring the MID Servers that communicate with your Microsoft Azure account.

Detailed instructions

See Azure Cloud Discovery.

Important: This configuration process applies only if you use the Discovery application to discover cloud resources. Skip this process if you use a different method for discovering resources.

MID Server settings for Cloud Cost Management

Note: MID Server minimum memory size should be 4 GB.

Setting	Value
Supported Applications	Cloud Actions
Capabilities	The **ALL** setting includes all required applications and capabilities. Alternatively, you can specify the following settings:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Setting	Value
	Note: You can specify the following settings for any number of MID Servers. If you specify multiple MID Servers, then Discovery, billing data download operations, and actions that are recommended by Cloud Cost Management are assigned to one of the MID Servers at random. Option 1: To use this MID Server only for Azure, specify both of the following values: • Cloud Actions • Azure Option 2: To use this MID Server for all providers, specify the following values: • Cloud Actions • AWS • Azure • Google Cloud

Using a proxy server

You can use a proxy server for the Cloud Cost Management MID Server. See Proxy server configuration for your Cloud Cost Management MID Server.

Related topics

- MID Servers
- Install a MID Server on Windows
- Install a MID Server on Linux

Proxy server configuration for your Cloud Cost Management MID Server

You can configure any MID Server to use a proxy server for Cloud Cost Management operations. Proxy servers support all cloud-based activities such as running Discovery, Billing Download jobs, and Price Sheet Download jobs.

Detailed instructions

See Proxy server configuration for MID Servers used for Cloud Discovery and Cloud Provisioning and Governance.

Proxy server limitations

- Only Windows or Linux platforms are supported.
- The Google Cloud integration is not supported.
- The VMware integration is not supported.
- Remote PowerShell scripts cannot be executed.
- Custom APIs might not work.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Supported proxy server authentication for Cloud Cost Management

Proxy Server type	Authentication type
HTTP/HTTPS	No authentication
SOCKS5	No authentication
HTTP/HTTPS	Basic authentication
SOCKS5	Basic authentication
HTTP/HTTPS	NTLM

Supported Proxy server configurations

Supported configuration settings

Configuration	Operating system	Proxy server	Authentication mode
Configuration 1	Linux	None	Not Applicable
Configuration 2	Windows	Squid (HTTPS)	None
Configuration 3	Linux	Squid (HTTPS)	Local
Configuration 4	Windows	Squid (HTTPS)	Active Directory

Related topics

- MID Servers
- Install a MID Server on Windows
- Install a MID Server on Linux

Set up access to Microsoft Azure billing and usage data

Set up access to Microsoft Azure billing and usage data depending on your agreement type.

You can access the billing and usage data, by assigning an appropriate role to the Microsoft Azure service principal, depending on your agreement type: Enterprise Agreement (EA), Microsoft Customer Agreement (MCA), or Microsoft Partner Agreement (MPA). Accordingly, some of the following steps might be optional for you.

1. Create a Microsoft Azure service principal
2. For EA accounts - Add the Enrollment Reader role to the Microsoft Azure service principal
3. For MCA accounts - Add the Billing Profile Reader role to the Microsoft Azure service principal
4. Create a record of Microsoft Azure credentials in Cloud Cost Management
5. Schedule and manage the jobs that download Azure billing data

Related topics

- Create exports on the Azure portal
- Cancel an Azure Billing download job in Cloud Cost Management

Create a Microsoft Azure service principal

Give Cloud Cost Management access to Microsoft Azure billing and usage data by creating a Microsoft Azure service principal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Microsoft Azure Role required: Azure Cloud admin

About this task
Cloud Cost Management supports Microsoft Azure billing and cost usage data for multiple types of billing agreements: Enterprise Agreement (EA), Microsoft Customer Agreement (MCA), and Microsoft Partner Agreement (MPA). There are specific roles that you must assign to the service principal depending on your billing agreement type. For more information on agreement types, see Billing information for Microsoft Azure.

Procedure
1. From a web browser, open the App Registrations page of the Microsoft Entra ID portal.
2. Log in using your global administrator credentials.
3. In the **Name** field of the Register an application form, enter a name for the application.
4. In the **Supported account types** field, select **Accounts in any organizational directory (Any Microsoft Entra ID – Single tenant)**.
5. Select **Register**.
   The application is registered and you're redirected to the Overview page of the new application.
6. On the Overview page, copy the values in the **Application (client) ID** and **Directory (tenant) ID** fields.
   Save them in a secure location for later use.
7. Generate a Client secret for your application.
   a. From the side navigation menu, navigate to **Manage** > **Certificates & secrets**.
   b. In the Client secrets section, generate a client secret for the application by selecting **New client secret**.
   c. In the dialog box, fill in the fields.

Add a client secret dialog box

Field	Description
Description	Description of the client secret.
Expires	Expiration of the client secret. **Note:** Your organization might apply policies to restrict client secret durability. Select an appropriate expiration period.

   d. Select **Add**.
   e. Copy the client secret that is generated and save at a secure location for later use.
8. Get **Subscription ID** to enable the service principal to work with various Azure subscriptions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Navigate to **Subscriptions**.

b. Select the **Subscription ID** to which the service principal needs access.

c. Copy the **Subscription ID** from the Subscription Overview page and secure it for later use. You require the **Subscription ID** while adding an Azure service account.

9. Assign access roles and permissions to the service principal depending on your billing agreement type.
Refer to the table for required roles and permissions for the service principal.

Roles and permissions for Azure service principal

Billing agreement type	Role required	Permissions
Enterprise Agreement (EA)	○ Enrollment Reader ○ Storage Blob Data Reader	These permissions are required for the service principal for all billing agreement types. ○ Microsoft.Compute/virtualMachines/instanceView/read ○ Microsoft.Compute/virtualMachines/deallocate/action ○ Microsoft.Compute/virtualMachines/start/action ○ Microsoft.Compute/virtualMachines/delete ○ Microsoft.Compute/virtualMachines/write ○ Microsoft.Compute/virtualMachines/read ○ Microsoft.Compute/locations/usages/read ○ Microsoft.Advisor/recommendations/read ○ Microsoft.Advisor/generateRecommendations/read ○ Microsoft.Advisor/generateRecommendations/action ○ Microsoft.Compute/disks/delete ○ Microsoft.Compute/disks/read
Microsoft Customer Agreement (MCA)	○ Billing Account Reader ○ Both Billing Profile Reader and Billing Reader ○ Storage Blob Data Reader	
Microsoft Partner Agreement (MPA)	○ Billing Reader ○ Storage Blob Data Reader	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Billing agreement type	Role required	Permissions
		○ Microsoft.CostManagement/forecast/read ○ Microsoft.Compute/locations/diskOperations/read ○ Microsoft.Insights/Metrics/Read ○ Microsoft.Compute/locations/operations/read ○ Microsoft.Sql ○ Microsoft.DBforMariaDB ○ Microsoft.DBforMySQL

What to do next

Create a record of Microsoft Azure credentials in Cloud Cost Management

Related topics

Add the Enrollment Reader role to the Microsoft Azure service principal

Add the Billing Profile Reader role to the Microsoft Azure service principal

Add a Microsoft Azure government service account

Add a Azure GovCloud service account to store the credential and access information. The government service account is designed specifically for U.S. government agencies and their authorized partners.

Before you begin

Role required: sn_cmp.cloud_admin

About this task

Azure GovCloud service account enables secure access to Azure resources. You can't use GovCloud service account for any other commercial purposes and should create a separate service account for Azure commercial. You can set up download jobs for billing and price sheet data for the GovCloud service account.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Service accounts**.
2. Select **New**.
3. On the Cloud Service Account form, fill in the fields.

Cloud Service Account form fields

Field	Description
Name	Unique and meaningful name for this service account.
Account Id	The Azure Account ID value that you copied from the Azure portal into the text file.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	The value in this field changes based on the type of account that you set. ○ For billing service accounts, the Account ID is the Enrollment ID. ○ For other service accounts, the Account ID is the Subscription ID.
Discovery credentials	The credentials needed for ServiceNow applications to access this account. You might configure this field at a later stage, while configuring access to Azure accounts. ○ If you configured Azure credentials at ServiceNow AI Platform, select the name of the relevant Azure credential. ○ To use other Azure accounts to access this account, leave the field empty.
Datacenter URL	URL of the datacenter. This field is required only for Azure GovCloud (US) accounts.
Datacenter Type	Type of the datacenter where the account is hosted. Select **Azure datacenter**.
Datacenter discovery status	Status and timestamp of the last execution of discovery on the datacenter. This value is generated automatically.
Is Billing Account	Option for enabling the account to access billing data. This option is available only when Cloud Integrations Azure scope is used. For the existing billing accounts, this check box is selected by default.
Is Management Group	Option for enabling the account for running Discovery. This option is available only when Cloud Integrations Azure scope is used. For the existing accounts where Discovery is run, this check box is selected by default.

4. Select **Save**.

Result

The service account that you created gets listed on the **Service accounts** page.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Schedule and manage the Cloud Cost Management jobs that download Microsoft Azure price sheets

Add a Microsoft Azure service account

Add an Azure service account to store the credential and access information. You can use this service account for commercial purpose and it should be different from your Azure government service account.

Before you begin

Role required: discovery_admin or sn_cmp.cloud_admin

Set up download jobs for billing and price sheet data for the service account.

About this task

A service account is a secure record on your instance that stores the credential and access information for your provider account. Discovery uses the information to access your provider account to get data on each resource in each specified datacenter. A cloud account can include multiple service accounts — even service accounts from different providers. For each service account, you specify which datacenters to include in the cloud account.

Note: The service account must have Discovery credentials to get the Azure forecast data.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Service accounts**.
2. Select **New**.
3. On the Cloud Service Account form, fill in the fields.

Cloud Service Account form fields

Field	Description
Name	Unique and meaningful name for this service account.
Account Id	The Azure Account ID value that you copied from the Azure portal into the text file. The value in this field changes based on the type of account that you set. ○ For billing service accounts, the Account ID is the Enrollment ID. ○ For other service accounts, the Account ID is the Subscription ID.
Discovery credentials	The credentials needed for ServiceNow applications to access this account. You might configure this field at a later stage, while configuring access to Azure accounts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ If you configured Azure credentials at ServiceNow AI Platform, select the name of the relevant Azure credential. ○ To use other Azure accounts to access this account, leave the field empty.
Datacenter URL	URL of the datacenter. This field is required only for Azure GovCloud (US) accounts.
Datacenter Type	Type of the datacenter where the account is hosted. Select **Azure datacenter**.
Datacenter discovery status	Status and timestamp of the last execution of discovery on the datacenter. This value is generated automatically.
Is Billing Account	Option for enabling the account to access billing data. This option is available only when Cloud Integrations Azure scope is used. For the existing billing accounts, this check box is selected by default.
Is Management Group	Option for enabling the account for running Discovery. This option is available only when Cloud Integrations Azure scope is used. For the existing accounts where Discovery is run, this check box is selected by default.

4. Select **Save**.

Result

The service account that you created gets listed on the **Service accounts** page.

Related topics

- Schedule and manage the jobs that download Azure billing data
- Schedule and manage the Cloud Cost Management jobs that download Microsoft Azure price sheets
- Discovery for Microsoft Azure

Add the Enrollment Reader role to the Microsoft Azure service principal

Assign the Enrollment Reader role to the Azure service principal for your Enterprise Agreement (EA) account to retrieve billing, purchase, and pricing data. You can assign this role using a Microsoft API.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: Enterprise administrator

About this task
Enrollment reader roles can view subscription charges related data at the enrollment, department, and account scopes. They can also view the Azure prepayment balance linked with the enrollment. Enrollment reader role is required only for EA accounts.

Procedure
1. Navigate to the Role Assignments - Put page in the Microsoft Azure documentation.
2. Run the API by selecting the **Try It** button.
3. Select **Sign in**.
4. On the login page, enter your Microsoft Azure account credentials to sign in to the tenant.
5. On the API request parameters form, fill in the fields.

Role Assignments API request parameters

Field	Description
billingAccountName	The Azure EA billing account ID. You can find the billing account ID on the Azure portal on the Cost Management + Billing overview page.
billingRoleAssignmentName	A unique ID to identify the name of the role that you want to assign. You can use a GUID generator website to generate a unique ID.
Body	The request body with parameters in JSON code. Enter the following JSON code in the body. `{ "properties": { "principalId": "{enterprise-application (or SPN) object-id}", "principalTenantId": "{tenant-id}", "roleDefinitionId": "/providers/Microsoft.Billing/billingAccounts/{ea-account-id}/billingRoleDefinitions/24f8edb6-1668-4659-b5e2-40bb5f3a7d7e" } }` In this code: ○ principalID: object ID of the EA account ○ principalTenantID: tenant (directory) ID of the EA account

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ roleDefinitionId: ID of the role definition, for example, 24f8edb6-1668-4659-b5e2-40bb5f3a7d7e is the role definition ID of the enrollment reader role For details on the object ID and tenant ID, see Microsoft documentation. **Important:** Replace only the `ea-account-id` string with the actual EA billing account ID.

Note: You must not change the values in the **api-version** and **Content-Type** fields.

6. Complete the role assignment for the Azure EA account by selecting **Run**.

What to do next
Schedule and manage the jobs that download Azure billing data

Add the Billing Profile Reader role to the Microsoft Azure service principal

Assign the Billing Profile Reader role to the Azure service principal for your Microsoft Customer Agreement (MCA) account to download Azure price sheet data.

Before you begin
Role required: Azure Cloud admin

About this task
The Billing Profile Reader role provides the required permissions to download price sheet data at the profile scope only for MCA accounts. For more information on Azure roles, see Microsoft documentation.

Procedure

1. Log in to the Azure portal and search for **Cost Management + Billing** .
2. Select **Billing scopes**.
3. Select **Access Control (IAM)** at the billing profile scope to which you're assigning the billing profile reader role.
4. Select **+Add**.
5. In the Add role assignment window, select **Billing profile reader** in the **Role** field.
6. In the **Users, groups, or apps** field, select the service principal to which you're assigning the role.
7. Complete the role assignment for the Azure MCA account by selecting **Add**.

What to do next
Schedule and manage the jobs that download Azure billing data

Related topics

Schedule and manage the Cloud Cost Management jobs that download Microsoft Azure price sheets

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a record of Microsoft Azure credentials in Cloud Cost Management

Securely store your Microsoft Azure credentials in the ServiceNow AI Platform credentials store. You must create a service account that accepts billing data for Cloud Cost Management.

Before you begin

Role required: sn_clin_core.insights_admin or admin

Procedure

1. Navigate to **Cloud Cost Management Workspace** > **Operations** > **Administration** > **Credentials**.
2. On the Cloud API credentials page, select **Azure service principal**.
3. Select **New**.
4. On the form, fill in the fields.

Azure Service Principal form

Field	Description
Name	Name of the service principal to register with the instance. For example, `CloudInsights-SP`.
Tenant ID	An unique identifier or alias for the tenant. Copy and paste the Tenant ID value from the `Azure-Credentials.txt` file.
Client ID	Unique identifier of an application created in Active Directory. Copy and paste the Tenant ID value from the `Azure-Credentials.txt` file.
Authentication Method	Select **Client Secret**. The Secret key field appears when you select Client Secret. **Note:** Client Assertion isn't supported.
Secret key	Azure client secret key. Copy and paste the Tenant ID value from the `Azure-Credentials.txt` file.
Active	Option to enable the credentials for use.

5. Select **Save**.

What to do next

Schedule and manage the jobs that download Azure billing data

Create exports on the Azure portal

Create exports for your Azure service account to download Azure billing data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Roles required:

- For Enterprise Agreement (EA): Enterprise administrator, Storage Account Contributor
- For Microsoft Customer Agreement (MCA): Billing account owner or contributor, Storage Account Contributor
- For Subscriptions (EA/MCA/MPA): contributor, Storage Account Contributor

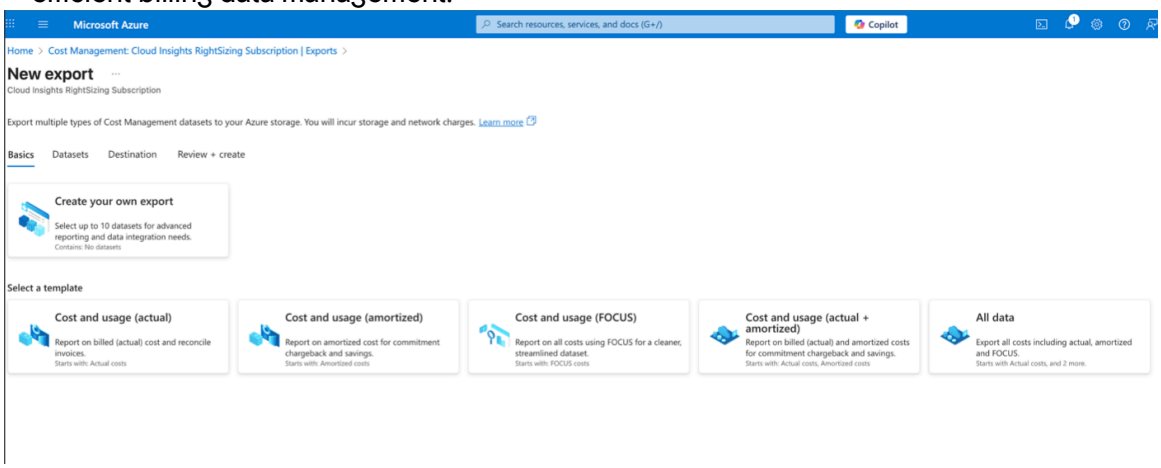
About this task

When you're using the Azure Export method to download billing data, you must create an export for your service account on the Azure portal to export billing data to your ServiceNow storage account.

Cloud Cost Management 10.0 and later versions support the FOCUS billing format in addition to the Cloud Native billing format. You must create exports for your Azure service account with the appropriate cost template.

Procedure

1. Log in to the Azure portal and search for **Cost Management** .
2. Select a billing account scope.
3. Select **Exports**.
4. Select **+ Create**.
5. On the Basics tab, select one of the following templates.
   - For the Cloud Native billing format, create exports with the **Cost and usage (actual)** and **Cost and usage (amortized)** templates to ensure accuracy of billing data.
   - For the FOCUS billing format, create exports with the **Cost and usage (FOCUS)** to ensure efficient billing data management.



6. Select **Next**.
7. On the Datasets tab, enter **Export prefix** to customize your export name.
8. Select the edit icon next to the export name that you want to edit.
9. In the Edit export window, fill in the fields.

Edit export window fields

Field	Description
Type of data	The type of billing data for the export.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Export name	A unique name for the export.
Dataset version	The version of the dataset. **Note:** Because other dataset versions might have different requirements, you should select **2024-08-01** as the dataset version.
Frequency	The option to export data at an interval that meets your requirement. Select **Daily export of month-to-date costs** for the daily export of your data. **Important:** The Billing Download job must run at least 30–60 minutes after the export of billing data to ensure that the latest data is included in the download.
Compression	Mode of compressing the export data. You can select **None** or **Zip** depending on your preference.
Export description	A brief description of the export.

10. Select **Next**.
11. On the Destination tab, select the field values that meet your requirement.

    Note: Select **CSV** in the **Format** field because Cloud Cost Management 9.0 and later versions currently supports the CSV format only. The **Overwrite data** check box should be cleared so that the previously downloaded data doesn't get overwritten with the latest downloads.

12. Select **Next**.
13. On the Review + create tab, review your export configuration and change if necessary.

Result
The export that you have created appears in the list of exports.

Related topics

Schedule and manage the jobs that download Azure billing data

Schedule and manage the jobs that download Azure billing data

Billing Download jobs download, organize, and store billing data for your payer account on the schedule that you specify. The system analyzes the data to generate reports and to make recommendations for changes in your cloud operations that can lead to cost savings.

Before you begin
Ensure that your system has 8 GB Clotho memory and 4 GB mid memory.

Role required: Cloud Integrations Admin [sn_cld_intg_core.cloud_integrations_admin]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

- To ensure accurate reporting and recommendations for some providers, make sure that Discovery runs before the scheduled execution.
- You can create only one Billing Download job for each service account.
- Only costs of unblended type are supported.
- Each successful execution of a Billing Download job updates tagged costs. Recent updates that you make to tag category definitions (for example, adding a tag name to a category) might not be reflected in cost reports. You should map tag values to tag categories after the first run because populating tag values needs at least one successful run. For more information on applying the latest tag category definitions to cost data without running a Billing Download job, see Create and update a tag category.
- When a Billing Download job successfully completes, it triggers the Budget Forecast, Business hours, Rightsizing, Commitments, and Unused resources jobs to analyze spend and usage data. This action also updates the actionable recommendations in reports.
- When the scheduled time arrives, job execution happens in multiple stages (for example, connect to the provider, download the data, perform the post-import sort, and so on). The system logs status and results on the Price Sheet Executions page for each stage.
- Cost categories are updated with new cost tag values each time billing data is downloaded. For example, the Cost Center category might include the tags development, testing, and QA. The User category might include the names of your users.
- Billing data is downloaded in reverse chronological order by month. For example, if the range is from March to June, data for June is downloaded first.
- To ensure meaningful results for the first billing data download, the app downloads data for minimum 30 days. For example, if today is June 10 and you specify June for download, the system downloads data for both May and June to ensure a minimum 30 days of data for analysis.
- You can download data only for the most recent 12 months.

- Whenever you provision a Kubernetes cluster, one default resource group gets created as *MC_myResourceGroup_myAKSCluster_eastus*. For example, if you provision a Kubernetes cluster with a resource group name as *TestResourceGroup*, Azure uses this resource group name and provisions another resource group as *MC_<name of the resource group>_<name of the cluster>_<location of the cluster>*.

  All resources of the Kubernetes cluster are included in the resource group provided by Azure. When you run a Billing Download job, the list of resources included in the resource group with this naming convention *MC_<name of the resource group>_<name of the cluster>_<location of the cluster>* is checked.

  - A tag *sn_ccm_k8_cluster_name* is added to the Kubernetes cluster when the billing download job runs.
  - A tag *sn_ccm_k8_cluster_name* is added to the resources of the Kubernetes cluster present in the resource group when the Spend job runs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

- If you provide your own name to the asset or resources of a resource group, you can't view the spend for Kubernetes clusters.
- Install Discovery and Service Mapping Patterns application (sn_itom_pattern) 1.10.2 or higher. For more information, see Install Discovery and Service Mapping Patterns.
- Install CMDB CI Class Models (sn_cmdb_ci_class) version 1.53.1 or higher. For more information, see CMDB CI Class Models app.
- To set up Kubernetes discovery, see Kubernetes discovery using patterns.

- If you have installed the Cloud Cost Management Infra Stack application along with Cloud Cost Management version 8.1, bill processing only happens on the Kubernetes cluster outside the Glide but within the ServiceNow datacenter. This framework supports parallel processing of data in chunks, making the billing file download faster.

  After you submit a request for Azure billing data, the blobs are generated based on the chunk size. You can use the system property *sn_cld_intg_azure.billing_chunk_duration* to set the chunk size. For details, see Configure the chunk size of Microsoft Azure billing blob. Consider an example where you want to download 30 days of billing data and you have set the chunk size to 3, then the billing data is available in 10 blobs. After all the blobs are generated, the state of the job changes from Ready to Requested. These blobs are stored in some blob storage on the Azure portal. The Kubernetes framework then downloads and processes the generated blobs from Azure.

  Note:

  If you have installed the Cloud Cost Management Infra Stack application, then toward the end of a job, significant database update, and insert operations are performed based on your Cloud CIs and spend data volume. Thus, any other job that impacts database performance shouldn't be run during this time alongside Cloud Cost Management jobs.

- From Cloud Cost Management version 8.1 onwards, the default time for billing download jobs has changed from 12:00 to 01:00 (UTC). Also, schedule or run Cloud Cost Management jobs only during off-business hours and when there's no other heavy operations or jobs running on the ServiceNow instance.
- Cloud Cost Management version 10.0 and later versions support the FinOps Open Cost and Usage Specification (FOCUS), the industry standard for delivering billing and usage data.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Billing download jobs**.
2. Select the *Azure* tab.
3. Select **New**.
4. On the form, fill in the fields:

Azure Billing Download Job

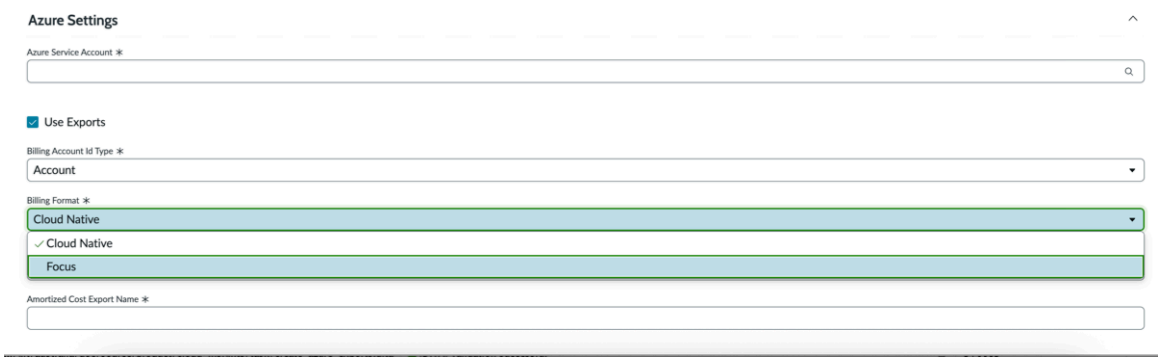
Field	Description
Name	Meaningful name for the scheduled execution of the Billing Download job.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Last successful execution	The timestamp of the most recent successful execution.
Notify users/groups	The users or groups to be notified by email of the status of the job execution (for example, download failure). The system doesn't send a notification for success. Users or groups with the Cloud Integrations Admin [sn_cld_intg_core.cloud_integrations_admin] role are well suited to handle these issues. To update the email template, navigate to **System Notification** > **Email** > **Notifications** and open the Notify on billing job execution error template. For information on configuring the email, see Create an email template.
Active	Option for activating the job. Only active jobs are executed.
Run	Frequency with which to execute the Billing Download job. This field is automatically set to **Daily**. **Note:** Depending on the value that you select, additional fields appear.
Time	Time of day to execute the job.
Latest execution status	The status of the most recently executed job.
Latest execution details	Execution details of the most recently executed job.
Azure Settings	
Azure Service account	The Azure service account.
Use Exports	Option for selecting the Azure Export method. The **Use Exports** check box is selected by default. If you don't want to use the Exports method, you must clear this check box.
The following fields appear when the **Use Exports** check box is selected.	
Billing Account Id Type	Level of billing account ID. Values include: ○ Account: When the billing is done on account level ○ Subscription: When the billing is done on subscription level

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: Select **Account** when the account ID is selected in the **Azure Service Account** field.
Billing format	The type of billing format. Values include: ○ Cloud Native ○ Focus
The following fields are visible when you select **Cloud Native** in the **Billing format** field.	
Actual Cost Export Name	Name of the actual cost export configured on the Azure portal. For more information, see Create exports on the Azure portal.
Amortized Cost Export Name	Name of the amortized cost export configured on the Azure portal. For more information, see Create exports on the Azure portal.
The following field is visible when you select **Focus** in the **Billing format** field.	
Focus Export Name	Name of the export as configured for the FOCUS billing format.



5. Select **Save**.
6. On the **Billing download jobs** page, select the created job.
7. Select **Test connection**.

   The Test Connection workflow uses the settings that you configured to attempt to access the provider account. The system displays a progress pop-up and a success/error message that suggests actions to fix the configured settings.
8. Select **Execute now** to execute the job after the connection succeeds.
9. In the **Download billing data** dialog box, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Start month	Starting month for downloading the billing data. **Note:** Data is downloaded for the specified months. If fewer than 30 days of data for analysis is received, data for the preceding month is also downloaded.
End month	Ending month for downloading the billing data.
Re-import data	Option for overwriting data from an earlier download attempt. **Note:** The complete billing download occurs on the fourth day or on the billing finalization date for the previous month, irrespective of the Re-import data option setting.

10. Select **Download**.
    An Azure billing download job goes through the following states during the job execution:
    a. **Ready**: Job is in the queue. For example, when a job is created to download billing data for a few months, the jobs for all months except the latest month are in Ready state.

       Note: If you have installed the Cloud Cost Management Infra Stack application, the Azure blob URLs are generated in the Ready state. For details, see Configure the chunk size of Microsoft Azure billing blob. Only when all the blobs are generated, the state changes to Requested.

    b. **Requested**: Job is fetched immediately. For example, the job that's created to download billing data for a month is in the Requested state. Also, when a job is created to download billing data for more than a month, the latest month job is also in the Requested state.
    c. **Reserved**: Job is picked by the Kubernetes cluster for processing. The Kubernetes cluster also sends the Job Id to the Glide side to show which Kubernetes job is processing the billing job.

       Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

    d. **In Progress**: Billing data is being processed.
    e. **Sink Begin**: Kubernetes cluster sends some part of the processed billing data to the tables such as Spend Report Daily Aggregate Cost and Spend Report Monthly Aggregate Cost on the Glide. The records in these tables are in the Generating state. The job remains in the Sink Begin state until the entire billing data is sent to Cloud Cost Management Glide.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

In the Sink Begin state, the CI placement also starts and the Status of the CI Placement Stage changes from Ready to In Progress.

Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

f. **Sink Complete**: All the processed billing data is sent to Cloud Cost Management Glide from the Kubernetes cluster.

Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

g. **Finished**: Status after Sink Complete when all the billing files are sent to the Glide database.

Note: The following changes happen when the job is marked Finished:

- The state of the records in the Spend Report Daily Aggregate Cost and Spend Report Monthly Aggregate Cost tables change from Generating to Active. Also, existing records are marked inactive.
- The status of the Azure EA to SA mapping execution stage changes from Ready to In Progress. In this execution stage, the Enterprise account is mapped to the Service account.

h. **Success**: Job is completed successfully.

Result

The following events happen when the job executes:

- While downloading the data, Cloud Cost Management updates the billing node data table [sn_cld_intg_<provider>_cost_usage] with the CIs in the CMDB that corresponds to each resource ID. If a CI doesn't exist, the system generates a placeholder CI. On subsequent discovery, the system reconciles the placeholder CI.
- Cloud Cost Management generates a log entry for each stage of the execution on the Billing Download Executions page.

Note: The supported CIs are placed after the Cumulus Unsupported CI Placement scheduled job runs daily. For more information, see Supported CI class types for Microsoft Azure services.

Cancel an Azure Billing download job in Cloud Cost Management

A Billing download job obtains billing and usage data from each payer account for Azure. The Rightsizing, Unused resources, and Business hours processes use billing and usage data when generating recommendations. You can cancel any Billing download job individually.

Before you begin

Role required: Cloud Integrations Admin [sn_cld_intg_core.cloud_integrations_admin]

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Billing download jobs**.
2. Select the **Azure** tab.
3. Select either a currently running or scheduled job that you want to cancel.
4. On the Azure Billing Download page, select **Cancel execution**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure the chunk size of Microsoft Azure billing blob

Reduce the time required to download Azure billing files by defining the chunk size of a blob.

Before you begin

Role required: admin

About this task

Important: This task is applicable only if you have installed the Cloud Cost Management Infra Stack application along with Cloud Cost Management version 8.1.

A single Azure billing blob can be large, resulting in performance issues during the download. If you have installed the Cloud Cost Management Infra Stack application, bill processing only happens on the Kubernetes cluster that's outside Glide but within ServiceNow datacenters. This new framework with Kubernetes cluster supports parallel processing of multiple chunks of blobs, making the billing file download faster. You can also set the system property *sn_cld_intg_azure.billing_chunk_duration* to specify the duration in number of days for which the billing data will be included in each chunk.

Procedure

1. Open the System properties table by entering `sys_properties.list` in the application filter.
2. Filter the list to open the *sn_cld_intg_azure.billing_chunk_duration* property. The default value is 3, which means that each blob contains three days billing data.
3. Modify the value as needed.

   Note: Performance improves by setting the property to a value below 3.

4. Save the property.

Schedule and manage the Cloud Cost Management jobs that download Microsoft Azure price sheets

A Price Sheet Download job downloads and stores price sheet data. The Rightsizing and Unused resources processes use price sheet data when generating recommendations.

Before you begin

Run the Discovery application on each service account.

Role required: insights_admin [sn_clin_core.insights_admin].

About this task

- You create a scheduled Price Sheet Download job for Microsoft Azure.
- Each execution of a Price Sheet Download job runs multiple execution items. Each execution item imports and stores the price sheet for one subscription or billing profile.
- To ensure accurate reporting and recommendations for some providers, make sure that the Discovery application runs before the scheduled execution.
- When the scheduled time arrives, job execution happens in multiple stages (for example, connect to the provider, download the data, perform the post-import sort, and so on). The system logs status and results on the Price Sheet Executions page for each stage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Cloud Cost Management version 9.0 supports price sheet download for both Azure Enterprise Agreement (EA) and Microsoft Customer Agreement (MCA) accounts.
- Cloud Cost Management version 10.0 supports price sheet download for Microsoft Partner Agreement (MPA) accounts in addition to the Azure Enterprise Agreement (EA) and Microsoft Customer Agreement (MCA) accounts.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Price sheet download jobs**.
2. Select **New**.
3. On the form, fill in the fields.

Price Sheet Download Job form fields

Field	Description
Name	A unique and meaningful name for the Price Sheet Download job.
Provider	Name of the cloud provider.
Download retail price sheet	Option to download retail price sheet without the need to provide account details and credentials required for the download.
Azure Service Account	Name of the Azure service account.
Download Price Sheet For	Price sheet downloads for different services. ○ Compute ○ Database ○ Storage
Last successful execution	Timestamp of the most recent execution of the job.
Active	Option for activating the Price Sheet Download Job. Only active jobs are executed.
Run	Frequency to execute the job. **Note:** Depending on the value that you select, additional fields appear. For example, if you select a **Run** value of **Monthly**, a **Day** field appears. A value of 3 would mean the third day of the month. This field is automatically set to **Monthly**.
Time	Time of the day to execute the job.
Current execution status	Status of the execution that is currently running.
Current execution details	Details for the execution that is currently running.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Select **Save**.
5. Select **Execute** to execute the job.
   During execution, Cloud Cost Management downloads and stores the data. You can find the execution ID, status, and execution logs in the **Price Sheet Executions** tab. If there's no new data, the execution is marked **Skipped**. If the download process is stuck, the execution is marked as **Canceled**.

Related topics

Rightsizing resources

Specify rate discounts to enable accurate pricing for Rightsizing recommendations

Cancel an Azure Price sheet download job in Cloud Cost Management

An Azure Price sheet download job downloads price sheet data from Azure. You can cancel any Price sheet download job individually.

Before you begin

For each provider, run Discovery on each service account.

Make sure to have the proper credentials and service account setup.

Role required: insights_admin [sn_clin_core.insights_admin].

About this task

Cloud Cost Management downloads price sheet data from each provider one region at a time. If you cancel a running price sheet download job, the current region finishes downloading and the system cancels download for the remaining regions. If you delete a scheduled job execution, then all regions are marked as canceled.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Price sheet download jobs**.
2. Select either a currently running or scheduled job that you want to cancel.
3. On the Price Sheet Download job page, select **Cancel execution**.

Configure Cloud Cost Management for Google Cloud

The Cloud Cost Management application is available on the ServiceNow Store.

General requirements and limitations

- Cloud Cost Management isn't supported on mobile devices.
- Values in reports might vary slightly from provider billing values due to currency conversion or rounding.

Requirements and limitations for Google Cloud

You must have Google Cloud administrator permissions to work in the Google Cloud Console

Download and activate Cloud Cost Management

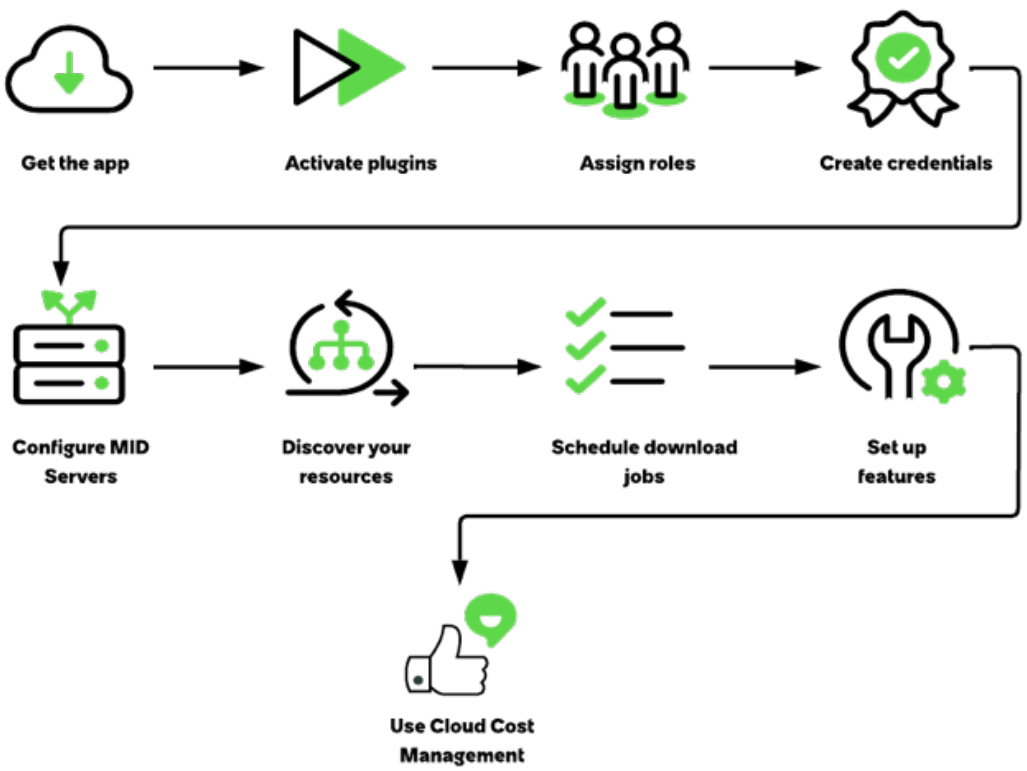
Role required: sys_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Step	Description	Action
Get the app.	Get the Cloud Cost Management app from the ServiceNow Store.	Visit the ServiceNow Store website to get the Cloud Cost Management app and supporting apps.
Activate all supporting plugins and applications.	Activate the plugins listed on the ServiceNow Store page for Cloud Cost Management. You might need to request some of the plugins from your ServiceNow representative.	For instructions, see: • Request as plugin • Activate a plugin

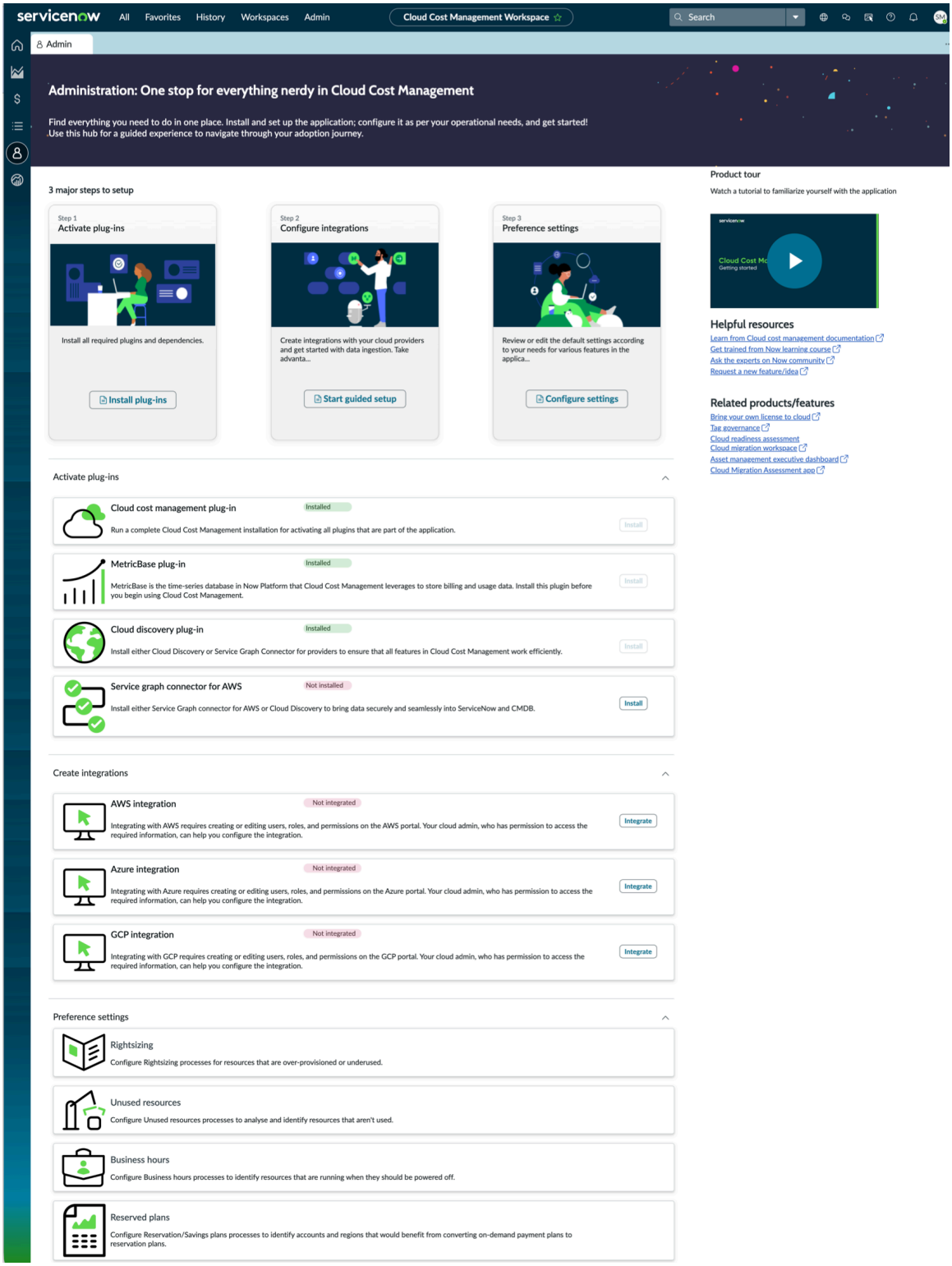
Overview: Setting up Cloud Cost Management

Here's an overview of your set up process. Detailed instructions appear in the table that follows.



Navigate to **Workspaces** > **Cloud Cost Management Workspace** > **Admin**. The Admin page enables you to set up a provider and preferences.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Tasks: Setting up Cloud Cost Management

Step	Description	Action
	You assign Cloud Cost Management roles to user groups and to individual users based on user activities and responsibilities.	Cloud Cost Management roles

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Step	Description	Action
Assign roles to Cloud Cost Management users and groups.		
 Set up access to Google Cloud.	To securely access data on your provider account, the Discovery process must present appropriate credentials. To make the credentials available to Discovery, you first create Google Cloud credentials in the Google Cloud portal. You then securely store the credentials in a service account in your instance.	Set up access to Google Cloud billing and usage data
 Configuring MID Servers to access CI data on provider accounts for Cloud Cost Management.	To ensure secure and reliable communications, the Discovery process communicates with your cloud provider accounts and cloud resources through one or more MID Servers. You can set up the MID Servers on your network or in one of your cloud networks.	Configuring access to CI data on your Google Cloud account
 Discover your cloud resources.	You schedule the Discovery process to ensure that the CMDB data on resources remains current.	Discovering your cloud resources for use
 Schedule and manage the jobs that download billing data for Cloud Cost Management.	Billing Download jobs download, organize, and store billing data for your payer account on the schedule that you specify. The system analyzes the data to generate reports and to make recommendations for changes in your cloud operations that can lead to cost savings.	Schedule and manage the jobs that download Google Cloud billing data
 Schedule and manage the Cloud Cost Management	A Price Sheet Download job downloads and stores price sheet data. The Rightsizing and Unused resources processes use price sheet data when generating recommendations.	Schedule and manage the Cloud Cost Management jobs that download Google Cloud price sheets

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Step	Description	Action
jobs that download price sheets.		
 Configure the Cloud Cost Management features: • Rightsizing • Unused Machines • Business Hours • Unassigned Resources	• The Rightsizing feature analyzes resource usage to recommend better sizes for resources that are wasting money by being over-provisioned or underused. A confidence rating and predicted savings support each recommendation. You schedule Rightsizing jobs to resize the resources you specify. • The Unused Machines feature analyzes usage data to identify resources that are wasting money because they aren't used. You schedule Unused Machines jobs to power-off or terminate the resources that you specify. • A Business Hours job applies policies to identify resources that are running when they should be powered off, reports them, and can start and stop them on a schedule that you specify. Running only during specified business hours can significantly reduce your cloud spend. • Unassigned Resources policies help you to identify the resources that aren't associated with a change group and to assign them appropriately. When a resource is assigned to the correct group, the resource can be appropriately governed even as it goes through stages such as patching, upgrading, and reconfiguring.	• Rightsizing resources • Unused resources • Business hours • Unassigned resources

Configuring access to CI data on your Google Cloud account

To ensure secure and reliable communications, the Discovery process communicates with your cloud provider accounts and cloud resources through one or more MID Servers. You can set up the MID Servers on your network or in one of your cloud networks.

Requirements

Important: This configuration process applies only if you use the Discovery application to discover cloud resources. Skip this process if you use a different method for discovering resources.

Detailed instructions

Google Cloud Platform Discovery

MID Server settings for Cloud Cost Management

Note: MID Server minimum memory size should be 4 GB.

Setting	Value
Supported Applications	Cloud Actions

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Setting	Value
Capabilities	The **ALL** setting includes all required applications and capabilities. Alternatively, you can specify the following settings: **Note:** You can specify the following settings for any number of MID Servers. If you specify multiple MID Servers, then Discovery, billing data download operations, and actions that are recommended by Cloud Cost Management are assigned to one of the MID Servers at random. Option 1: To use this MID Server only for Google Cloud, specify both of the following values: • Cloud Actions • Google Cloud Option 2: To use this MID Server for all providers, specify the following values: • Cloud Actions • Google Cloud • AWS • Azure

Using a proxy server

You can use a proxy server for the Cloud Cost Management MID Server. See Proxy server configuration for Cloud Cost Management MID Server.

Related topics

MID Servers

Install a MID Server on Windows

Install a MID Server on Linux

Proxy server configuration for Cloud Cost Management MID Server

You can configure any MID Server to use a proxy server for Cloud Cost Management operations. Proxy servers support all cloud-based activities such as running Discovery, Billing Download jobs, and Price Sheet Download jobs.

Detailed instructions

See Proxy server configuration for MID Servers used for Cloud Discovery and Cloud Provisioning and Governance.

Proxy server limitations

- Only Windows or Linux platforms are supported.
- The Google Cloud integration is not supported.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The VMware integration is not supported.
- Remote PowerShell scripts cannot be executed.
- Custom APIs might not work.

Supported proxy server authentication for Cloud Cost Management

Proxy Server type	Authentication type
HTTP/HTTPS	No authentication
SOCKS5	No authentication
HTTP/HTTPS	Basic authentication
SOCKS5	Basic authentication
HTTP/HTTPS	NTLM

Supported Proxy server configurations

Supported configuration settings

Configuration	Operating system	Proxy server	Authentication mode
Configuration 1	Linux	None	Not Applicable
Configuration 2	Windows	Squid (HTTPS)	None
Configuration 3	Linux	Squid (HTTPS)	Local
Configuration 4	Windows	Squid (HTTPS)	Active Directory

Related topics

MID Servers

Install a MID Server on Windows

Install a MID Server on Linux

Add a Google Cloud service account

Add a Google Cloud service account to store the credential and access information.

Before you begin
Role required: discovery_admin or sn_cmp.cloud_admin

Set up download jobs for billing and price sheet data for the service account.

About this task
A service account is a secure record on your instance that stores the credential and access information for your provider account. Discovery uses the information to access your provider account to get data on each resource in each specified datacenter. A cloud account can include multiple service accounts — even service accounts from different providers. For each service account, you specify which datacenters to include in the cloud account.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Service accounts**.
2. Select **New**.
3. On the form, fill in the fields.

Cloud Service Account

Field	Description
Name	Unique and meaningful name for this service account.
Account Id	The project_ID value from the associated JSON key file.
Discovery credentials	The credentials needed for ServiceNow applications to access this account. You may configure this field at a later stage, while configuring access to Google Cloud accounts. ○ If you configured Google Cloud credentials at ServiceNow AI Platform, select the name of the relevant Google Cloud credential. ○ To use other Google Cloud accounts to access this account, leave the field empty.
Datacenter URL	URL of the datacenter. This field is required only for Google Gov Cloud accounts.
Datacenter Type	Type of the datacenter where the account is hosted. Select *Google Cloud Platform* **datacenter**.
Datacenter discovery status	Status and timestamp of the last execution of Discovery on the datacenter. This value is generated automatically.
Is Billing Account	Option for enabling the account to access billing data.

4. Select **Save**.

Result

The service account that you created gets listed on the **Service accounts** page.

Related topics

Schedule and manage the jobs that download Google Cloud billing data

Schedule and manage the Cloud Cost Management jobs that download Google Cloud price sheets

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Setup roles for Google Cloud billing download

To perform billing download for Google Cloud, you need specific roles and permissions for various features.

Before you begin

Roles required:

- On the Google Cloud Console: Google Cloud administrator.
- Cloud Cost Management: insights_admin [sn_clin_core.insights_admin] or admin.

About this task

Procedure

1. Add the following required permissions for the Billing module in the Google Cloud provider console.

Function and feature	APIs and permission
Cost analysis and reporting ○ Cost allocation and tracking ○ Cost trend analysis ○ Budget monitoring ○ Spend forecasting ○ Custom cost reports	**Note:** These permissions enable retrieving billing and spend data for cost analysis. BigQuery (Billing data) ○ bigquery.jobs.create: Create jobs to query billing data ○ bigquery.jobs.list: List query jobs ○ bigquery.tables.getData: Read billing export data Resource manager ○ resourcemanager.projects.get: Get project cost context ○ resourcemanager.projects.list: List projects for cost aggregation
Recommendations ○ Identify under-used resources ○ Suggest optimal instance types ○ Recommend disk size adjustments ○ Cost optimization opportunities	**Note:** These permissions enable viewing the cost-saving recommendations. You must grant the permissions for retrieving billing and spend data before viewing the recommendations. BigQuery ○ bigquery.jobs.list: List BigQuery jobs ○ bigquery.tables.getData: Access table data for cost analysis Cloud SQL

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Function and feature	APIs and permission
	○ cloudsql.instances.get: Retrieve Cloud SQL instance details ○ cloudsql.instances.list: List all Cloud SQL instances ○ cloudsql.databases.get: Get database details ○ cloudsql.databases.list: List databases Compute engine ○ compute.instances.get: Retrieve VM instance details ○ compute.instances.list: List all VM instances ○ compute.instances.getIamPolicy: Get IAM policies for instances ○ compute.disks.get: Retrieve disk details ○ compute.disks.list: List all disks ○ compute.autoscalers.get: Get autoscaler configurations ○ compute.autoscalers.list: List autoscalers ○ compute.regions.list: List available regions ○ compute.snapshots.get: List all snapshot Recommender - Compute Instance Recommendations ○ recommender.computeInstanceMachineTypeRecommendat ○ recommender.computeInstanceMachineTypeRecommendat ○ recommender.computeInstanceMachineTypeRecommendat ○ recommender.computeDiskIdleResourceRecommendations ○ recommender.computeDiskIdleResourceRecommendations ○ recommender.computeDiskIdleResourceRecommendations ○ recommender.computeInstanceIdleResourceRecommendat ○ recommender.computeInstanceIdleResourceRecommendat ○ recommender.computeInstanceIdleResourceRecommendat Recommender – Cloud SQL Recommendations ○ recommender.cloudsqlIdleInstanceRecommendations.get ○ recommender.cloudsqlIdleInstanceRecommendations.list ○ recommender.cloudsqlIdleInstanceRecommendations.upda ○ recommender.cloudsqlOverprovisionedInstanceRecommen ○ recommender.cloudsqlOverprovisionedInstanceRecommen ○ recommender.cloudsqlOverprovisionedInstanceRecommen

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Function and feature	APIs and permission
	Recommender - General ○ recommender.locations.get: Get recommender location details ○ recommender.locations.list: List available recommender locations
Resource Lifecycle Management ○ Start/stop instances on schedule ○ Delete unused resources ○ Resize resources based on recommendations ○ Automated cost optimization actions	**Note:** These permissions enable active resource management to act on cost-saving measures across your cloud environments. You must grant the permissions for retrieving billing and spend data and viewing recommendations before granting permissions for resource management. Compute engine - Lifecycle operations ○ compute.instances.start: Start stopped instances ○ compute.instances.stop: Stop running instances ○ compute.instances.delete: Delete unused instances ○ compute.instances.update: Update instance configurations ○ compute.instances.setDiskAutoDelete: Configure disk auto-delete ○ compute.disks.delete: Delete unused disks ○ compute.disks.update: Update disk configurations ○ compute.snapshots.create: Create a new snapshot Cloud SQL - Lifecycle operations ○ cloudsql.instances.restart: Restart Cloud SQL instances ○ cloudsql.instances.delete: Delete unused SQL instances ○ cloudsql.instances.update: Update SQL instance configurations ○ cloudsql.databases.delete: Delete unused databases ○ cloudsql.databases.update: Update database configurations

2. Set the roles at the Google Cloud organization level so that it is applicable for all the projects under that level.
   The following APIs should be enabled on the Google Cloud Console for each project.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Compute Engine API
- Recommender API
- BigQuery API
- BigQuery Data Transfer API
- Cloud Resource Manager API
- Cloud SQL Admin API
- Batch API

3. For details on policy creation see Google Cloud docs.

Set up access to Google Cloud billing and usage data

Set up access to Google Cloud Platform (GCP) billing and usage data by following the steps.

1. Create a Google Cloud billing account
2. Create Google API credentials
3. Enable cost allocation in Google Cloud for Kubernetes cluster
4. Schedule and manage the jobs that download Google Cloud billing data
5. Add a Google Cloud CI class type to ensure accurate billing data

Related topics

Cancel a Google Cloud Billing download job

Create a Google Cloud billing account

Create a billing account, project, and BigQuery dataset in the Google Cloud Console.

Before you begin

You must be familiar with Google Cloud policies.

Role required: Google Cloud administrator

Procedure

1. Under the Google Cloud billing account, create a project that can store the billing data in a BigQuery dataset.

   Note: Charges associated with BigQuery usage are based on billing plans.

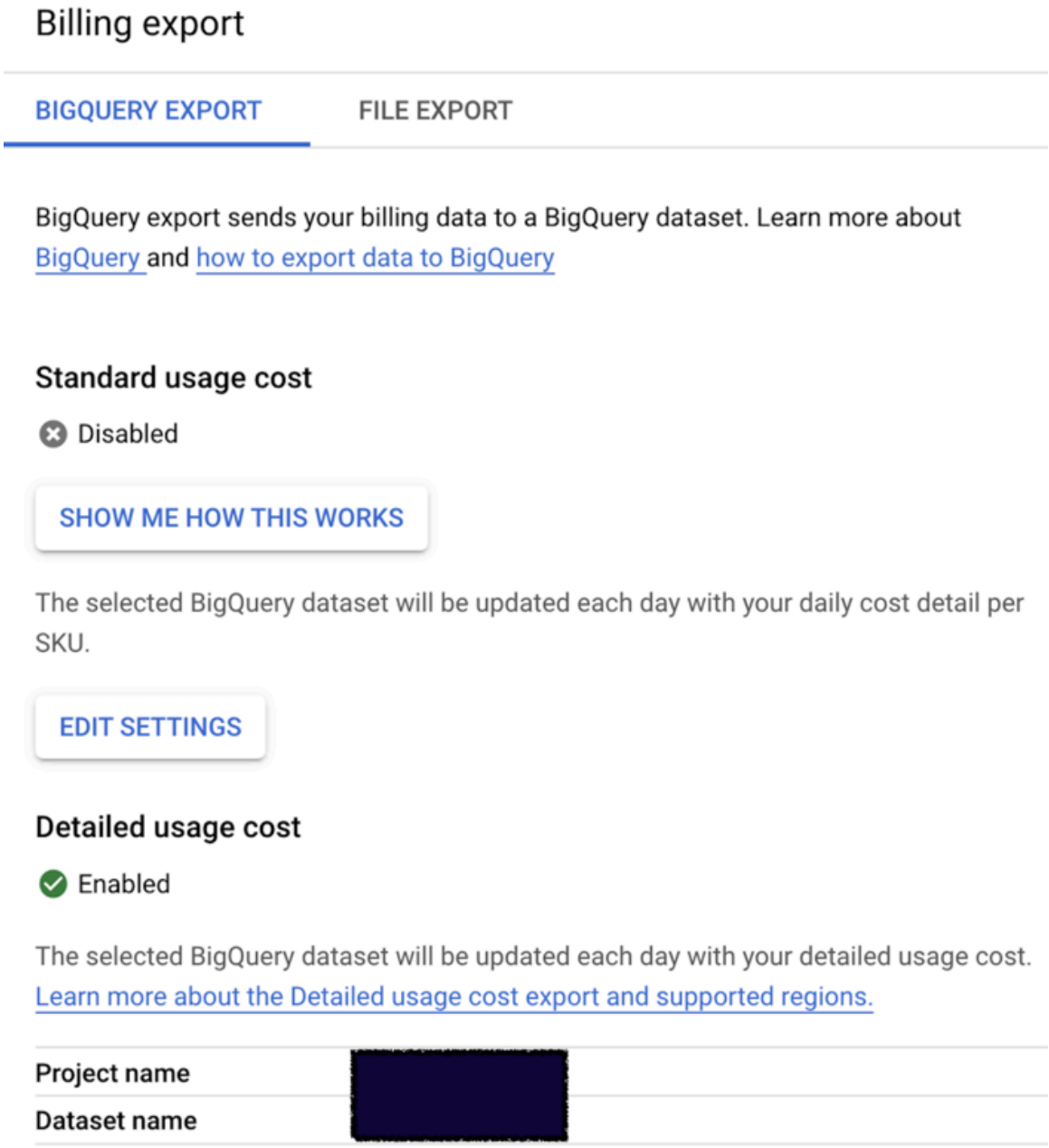
   a. Create a service account under the project and create a key.
   See the Create service accounts and Manage service accounts sections in Google Cloud docs for more information.

   b. Configure the service account to have access to all projects.
   You must have the Viewer role to all the projects.

   c. Download the key file (JSON file) which contains the required credentials.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. In the Google Cloud, enable Detailed usage costs to use Google Cloud Billing



Download.

Note: If you're configuring the billing download BigQuery dataset for the first time, read the Data availability section in the Understand the Cloud Billing data tables in Big Query topic from Google cloud documentation.

Create Google API credentials

To access data securely on your provider account, the Discovery process must be present with appropriate credentials.

Before you begin

Role required: insights_admin [sn_clin_core.insights_admin] or admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. In Cloud Cost Management, navigate to **Cloud Cost Management Workspace** > **Operations** > **Administration** > **Credentials**.
2. Select **Google API credentials**.
3. Select **New**.
4. On the form, fill in the fields.

Google API Credentials

Field	Description
Name	Unique and descriptive name for the Google Cloud credentials.
Active	Option to use the credential.
Type	Provider name, GCP.
Applies to	Indicates the MID Servers. If all, type All MID Servers.
EMail	Billing service account email.
Secret Key	Secret key that you generated on the Google Cloud Console.

5. Select **Save**.

Related topics

Cloud credentials

Enable cost allocation in Google Cloud for Kubernetes cluster

Enable cost allocation for each Kubernetes cluster before you run a Google Cloud Billing download job to view the Kubernetes spend.

Before you begin

Role required: Google Cloud administrator

- You should be familiar with Google Cloud policies.
- Install Discovery and Service Mapping Patterns application (sn_itom_pattern) 1.10.2 or higher. For more information, see Install Discovery and Service Mapping Patterns.
- Install CMDB CI Class Models (sn_cmdb_ci_class) version 1.53.1 or higher. For more information, see CMDB CI Class Models app.
- To set up Kubernetes discovery, see Kubernetes discovery using patterns.

About this task

- For identifying resources for Kubernetes clusters during billing download, the tag *sn_ccm_k8_cluster_name* is added to the resources, which already have **goog-k8s-cluster-name** tags.
- You must enable cost allocation for each individual Kubernetes cluster.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Log in to the Google Cloud Console.
2. Select the menu icon.
3. Select **Kubernetes Engine**.
4. Select **Clusters**.
5. In the Overview section, select a cluster name.
6. In the Features section, select Cost Allocation.

Result

The cost allocation for the selected Kubernetes cluster is enabled and you can view the Kubernetes spend.

Schedule and manage the jobs that download Google Cloud billing data

Billing Download jobs download, organize, and store billing data for your payer account on the schedule that you specify. The system analyzes the data to generate reports and to make recommendations for changes in your cloud operations that can lead to cost savings.

Before you begin

- Ensure that your system has 8 GB Clotho memory and 4 GB mid memory.
- You must set up required roles to perform billing download. For more information, see Setup roles for Google Cloud billing download.
- Enable cost allocation for each Kubernetes cluster before you run a Google Cloud Billing download job to view the Kubernetes spend. For more information, see Enable cost allocation in Google Cloud for Kubernetes cluster.

Roles required:

- On the Google Cloud Console: Google Cloud administrator.
- Cloud Cost Management: insights_admin [sn_clin_core.insights_admin] or admin.

About this task

During the billing download, all the resources are pulled into the system. GCP SQL databases are placed in the [cmdb_ci] table.

Note: From Cloud Cost Management version 8.1 onwards, the default time for billing download jobs has changed from 12 a.m. to 1 a.m. (UTC). Also, schedule or run Cloud Cost Management jobs only during off-business hours and when there's no other heavy operations or jobs running on the ServiceNow instance.

If you have installed the Cloud Cost Management Infra Stack application, then toward the end of a job, significant database update, and insert operations are performed based on your Cloud CIs and spend data volume. Thus, any other job that impacts database performance shouldn't be run during this time alongside Cloud Cost Management jobs.

- A Billing Download job creates and updates the billing node data table [sn_cld_intg_gcp_cost_usage] with billing line items from the BigQuery dataset.

Note: Charges associated with BigQuery usage are based on billing plans.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The CI placement process associates downloaded cost and usage data with the appropriate CIs in the CMDB. See Add a Google Cloud CI class type to ensure accurate billing data for details.
- Billing Download jobs can't be in the Global scope.
- You can create only one Billing Download job for each account.
- To ensure accurate reporting and recommendations for some providers, make sure that the Discovery application runs before the scheduled execution.
- Each successful execution of a Billing Download job triggers the Budget Forecast, Business hours, Commitments, Rightsizing, and Unused resources jobs to analyze spend and usage data and to update the actionable recommendations in reports.
- Each successful execution of a Billing Download job updates tagged costs. Recent updates that you make to tag category definitions (for example, adding a tag name to a category) might not be reflected in cost reports. You should map tag values to tag categories after the first run because populating tag values needs at least one successful run. You can apply the latest tag category definitions to cost data without running a Billing Download job, by selecting *Cloud Cost Management Workspace* > **Operations** > **Cost usage tags** > **Tag categories** and then selecting **Re-Apply Categories**.
- When the scheduled time arrives, job execution happens in multiple stages (for example, connect to the provider, download the data, perform the post-import sort, and so on). The system logs status and results on the Price Sheet Executions page for each stage.
- Cost categories are updated with new cost tag values each time billing data is downloaded. (You define cost tags in the provider portal to associate usage data with a particular business entity. For example, the Cost Center category might include the tags `development`, `testing`, and QA. The User category might include the names of your users.)
- Billing data is downloaded in reverse chronological order by month. For example, if the range is from March to June, data for June is downloaded first.
- To ensure meaningful results for the first billing data download, the app downloads data for at least 30 days. For example, if today is June 10 and you specify June for download, the system downloads data for both May and June to ensure at least 30 days of data for analysis.
- You can download data only for the most recent twelve months.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Billing download jobs**.
2. Select the *Google* tab.
3. Select **New**.
4. On the form, fill in the fields.

Google Billing Download Job

Field	Description
Name	Meaningful name for the scheduled execution of the Billing Download job.
Last successful execution	The timestamp of the most recent successful execution.
Notify users/groups	The users or groups to notify by email of the status of the job execution (for example,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	download failure). The system doesn't send a notification for success. Users or groups with the Cloud Integrations Admin [sn_cld_intg_core.cloud_integrations_admin] role are well suited to handle these issues. To update the email template, navigate to **System Notification** > **Email** > **Notifications** and open the Notify on billing job execution error template. For information on configuring the email, see Create an email template.
Active	Option for activating the job. Only active jobs are executed.
Run	Frequency with which to execute the Billing Download job. This field is automatically set to **Daily**. **Note:** Depending on the value that you select, additional fields appear.
Time	Time of day to execute the job.
Latest execution status	The status of the most recently executed job.
Latest execution details	Execution details of the most recently executed job.
Google Settings	
Billing account	Account to access for billing data. Every account for which the **Is Billing account** setting is true appears in the selection list. For more information about the **Is Billing account** field, see Add a Google Cloud service account. For example, the Billing account ID must be in the `0XX0A - AXX9 - 6XXXA` format.
BigQuery project Id	The project ID, which contains the BigQuery dataset.
BigQuery dataset name	The name of the BigQuery dataset where the billing data is getting stored on an hourly basis.

5. Select **Test Connection**.

   The Test Connection workflow uses the settings that you configured to attempt to access the provider account. The system displays a progress pop-up and a success/error message that suggests actions to fix the configured settings.

6. Select **Execute now** to execute the job after the connection succeeds.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. In the **Download billing data** dialog box, fill in the fields.

Field	Description
Start month	Starting month for downloading the billing data. **Note:** Data is downloaded for the specified months. If fewer than 30 days of data for analysis is received, data for the preceding month is also downloaded.
End month	Ending month for downloading the billing data.
Re-import data	Option for overwriting data from an earlier download attempt.

8. Select **Download**.
   A Google Cloud billing download job goes through the following states during the job execution:
   a. **Ready**: Job is in queue. For example, when a job is created to download billing data for a few months, the jobs for all months except the latest month are in Ready state.
   b. **Requested**: Job will be fetched and processed immediately. For example, the job that's created to download billing data for a month is in the Requested state. Also, when a job is created to download billing data for more than a month, the latest month job is also in the Requested state.
   c. **Reserved**: Job is picked by the Kubernetes cluster for processing. The Kubernetes cluster also sends the Job Id to Cloud Cost Management Glide to show which Kubernetes job is processing the billing job.

      Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

   d. **In Progress**: Billing data is being processed.
   e. **Sink Begin**: Kubernetes cluster sends some part of the processed billing data to the tables such as Spend Report Daily Aggregate Cost and Spend Report Monthly Aggregate Cost on the Glide. The records in these tables are in the Generating state. The job remains in the Sink Begin state until the entire billing data is sent to Glide.

      In the Sink Begin state, the CI placement also starts and the Status of the CI Placement Stage changes from Ready to In progress.

      Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

   f. **Sink Complete**: All the processed billing data is sent to Cloud Cost Management Glide from the Kubernetes cluster.

      Important: This state is applicable only if you have installed the Cloud Cost Management Infra Stack application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

g. **Finished**: Status after Sink Complete when all the billing files are sent to the Glide database.

Note: The following changes happen when the job is marked Finished:

- The state of the records in the Spend Report Daily Aggregate Cost and Spend Report Monthly Aggregate Cost tables change from Generating to Active. Also, existing records are marked inactive.
- All the sub accounts are mapped to the parent account.

h. **Success**: Job is completed successfully.

Result

The following events happen when the job executes:

- While downloading the data, Cloud Cost Management updates the billing node data table [sn_cld_intg_<provider>_cost_usage] with the CIs in the CMDB that correspond to each resource ID. If a CI doesn't exist, the system generates a placeholder CI. On subsequent discovery, the system reconciles the placeholder CI.
- Cloud Cost Management generates a log entry for each stage of the execution on the Billing Download Executions page.

Add a Google Cloud CI class type to ensure accurate billing data

Specify the details of a new CI or CI type to enable the CI placement process to assign cost and usage data correctly. The process is a part of Billing Download job execution. The CI placement process associates downloaded cost and usage data with the appropriate CIs.

Before you begin

Role required: Cloud Cost Management Admin [sn_clin_core.insights_admin]

About this task

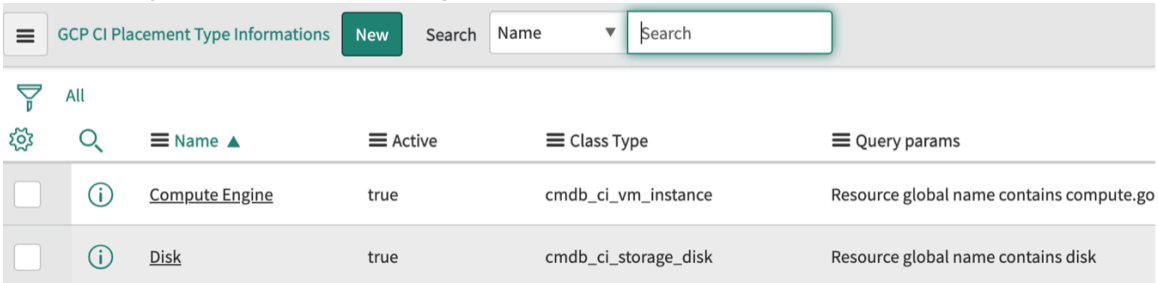
Billing Download jobs store downloaded billing data in the billing node table. The Class Type table holds CI type definitions for the cost usage table. Cloud Cost Management executes the CI placement process to associate the billing and usage data with CIs in the CMDB. The CI placement process queries the billing node table using the CI type definitions that reside in the CI placement type table. For a new CI (or a CI type from a new provider), you specify the parameters that uniquely define the CI, a CI type definition, and a class type table to store the CI type definition.

The CI placement type table for Google Cloud [sn_cld_intg_gcp_ci_placement_type] inherits from the Core CI placement type table (sn_cld_intg_core_ci_placement_type).

Procedure

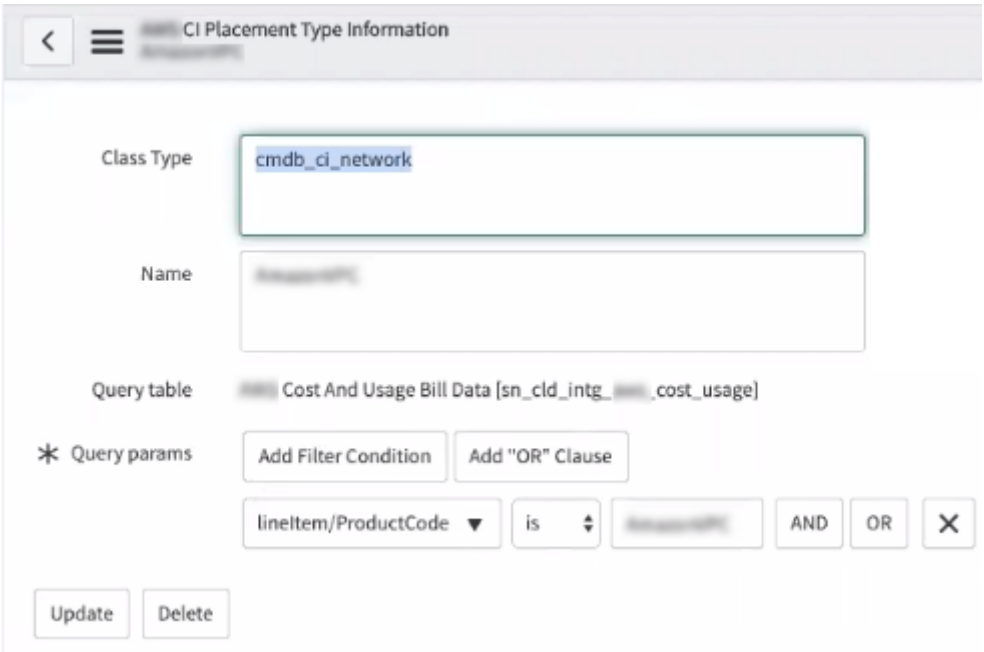
1. Go to the CI placement type table and select **New**.

Google Cloud class types in the Core CI placement type table [sn_cld_intg_core_ci_placement_type]



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Fill in the form.



CI Placement Type Information form

Field	Description
Class type	CMDB class type table that this type of CI is stored in. New CIs of this type are added to the table.
Name	Name of the CI type.
Query table	Billing node table that the CI placement process queries to find instances of the CI type. Query table is sn_cld_gcp_cost_usage and cannot be changed.
Query params	Parameter values in the billing node table that uniquely define the CI type.

3. After you add a class type, you must reimport billing and usage data to ensure that CIs are correctly placed into the new type.

Note: The supported CIs are placed after the Cumulus Unsupported CI Placement scheduled job runs daily. For more information, see Supported CI class types for Google Cloud services.

Cancel a Google Cloud Billing download job

A Billing download job obtains billing and usage data from each payer account for Google Cloud. The Rightsizing, Unused resources, and Business hours processes use billing and usage data when generating recommendations. You can cancel any Billing download job individually.

Before you begin

Roles required:insights_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Billing download jobs**.
2. Select the **Google** tab.
3. Select either a currently running or scheduled job that you want to cancel.
4. On the Google Billing Download page, select **Cancel execution** or **Cancel**.

Schedule and manage the Cloud Cost Management jobs that download Google Cloud price sheets

A Price Sheet Download job downloads and stores price sheet data.

Before you begin

Ensure that you have the proper credentials and service account setup.

Role required: insights_admin [sn_clin_core.insights_admin].

About this task

- You create a scheduled Price Sheet Download job for each provider.
- A single API fetches the Price Sheet details for all regions at once.
- When the scheduled time arrives, job execution happens in multiple stages (for example, connect to the provider, download the data, perform the post-import sort, and so on). The system logs status and results on the Price Sheet Executions page for each stage.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Price sheet download jobs**.
2. Select **New**.
3. On the form, fill in the fields.

Price Sheet Download Job

Field	Value
Name	Meaningful name for the Price Sheet Download job.
Provider	Name of the cloud provider.
Last successful execution	Timestamp of the most recent execution of the job.
Download Price Sheet For	Price sheet downloads for different services. ○ AWS ▪ Compute and Storage ▪ Database ▪ All ○ Azure

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	▪ Compute ▪ Database ▪ Storage ○ Google ▪ Compute and Storage ▪ Database ▪ All
Active	Option for activating the Price Sheet Download Job. Only active jobs are executed.
Run	Frequency to execute the job. **Note:** Depending on the value that you select, additional fields appear. For example, if you select a **Run** value of **Monthly**, a **Day** field appears. A value of 3 would mean the third day of the month. This field is automatically set to **Monthly**.
Time	Time of day to execute the job.
Current execution status	Status of the execution that is currently running.
Current execution details	Details for the execution that is currently running.

4. Select **Save**.
5. Select **Execute** to execute the job.
   During execution, Cloud Cost Management downloads and stores the data. You can find the execution ID, status, and execution logs in the **Price Sheet Executions** tab. If there's no new data, the execution is marked **Skipped**. If the download process is stuck, the execution is marked as **Canceled**.

Related topics

Rightsizing resources

Cancel a GCP Price sheet download job in Cloud Cost Management

An GCP Price sheet download job downloads price sheet data from Google Cloud Platform (GCP). You can cancel any Price sheet download job individually.

Before you begin

For each provider, run Discovery on each service account.

Make sure to have the proper credentials and service account setup.

Role required: insights_admin [sn_clin_core.insights_admin].

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Cloud Cost Management downloads price sheet data from each provider one region at a time. If you cancel a running price sheet download job, the current region finishes downloading and the system cancels download for the remaining regions. If you delete a scheduled job execution, then all regions are marked as canceled.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Price sheet download jobs**.
2. Select either a currently running or scheduled job that you want to cancel.
3. On the Price Sheet Download job page, select **Cancel execution**.

Configuring ServiceNow Otto for Cloud Cost Management (CCM)

Configure the ServiceNow Otto for Cloud Cost Management application to use the generative AI skills for spend summarization.

Install ServiceNow Otto for Cloud Cost Management (CCM)

If you have the admin role, you can install the ServiceNow Otto for Cloud Cost Management (CCM) application. ServiceNow Otto for CCM enables cloud resource managers and users to use the capabilities of generative AI skills in Cloud Cost Management.

Before you begin

Role required: admin

Procedure

1. Go to the ServiceNow Store.
2. In the search bar, enter ServiceNow Otto for Cloud Cost Management (CCM) and then select **Search**.
3. Select the ServiceNow Otto for Cloud Cost Management (CCM) widget and then select **Get** to make this application available for installation on your ServiceNow instance.
4. On your ServiceNow instance, navigate to **All** > **System Definitions** > **Plugins**.
5. Search for the ServiceNow Otto for Cloud Cost Management (CCM) application.
6. Select **Install**.

Result

The generative AI skills included in the ServiceNow Otto for Cloud Cost Management (CCM) application are installed on your ServiceNow instance.

What to do next

Activate the AI Search application on your ServiceNow instance enabling the AI agents to search and get related records.

1. Navigate to **All** > **AI Search** > **AI Search Status**.
2. Trigger the automatic AI Search activation process on your ServiceNow instance by selecting **Request AI Search**.

Note: The activation process can take up to 24 hours.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Using Cloud Cost Management

Use Cloud Cost Management to rightsize, identify, assign, manage, and analyze usage data of your cloud resources.

Analyze cloud spend using the Cloud cost summarizer generative AI skill

View actionable optimization insights with a comprehensive AI-generated summary of your cloud spend trends, top cost drivers, and budget alignment with your selected filters and groupings.

Before you begin

All the required plugins must be installed for the Cloud cost summarizer generative AI skill to function smoothly. For more details, see Supported version and required plugins.

Role required: insights_admin

About this task

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

The Cloud cost summarizer generative AI skill generates comprehensive summary of your cloud spend trends across cloud providers, top cost drivers, and optimization recommendations. The summary displays month-over-month and year-over-year changes, commitment coverage, and the top five recommendations to reduce costs. These insights help you to make more informed decisions about your cloud spend.

Procedure

1. Navigate to **Workspaces** > *Cloud Cost Management Workspace*.
2. Select **Cloud cost overview**.
3. In the Monthly spend breakdown report, select appropriate values in the **Group by**, **Time range**, and **Cost type** fields.
4. Select **Summarize**.
   A spend summary card of your cloud spend trends, top cost drivers, and actionable optimization recommendations is displayed.
5. **Optional:** You can perform the following actions on the generated summary.

Action	Description
Copy to clipboard icon	Copies the summary to a clipboard.
Refresh icon	Regenerates the publisher summary.
Feedback	If you found that the summary was helpful, select the helpful icon. If you found that the summary wasn't helpful, select the not helpful icon. This feedback improves the generative AI model and can help to improve future versions of this skill. The system gathers the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action	Description
	feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).

Manage unused resources

Reduce cost by identifying the unused resources and scheduling jobs to power-off or terminate the unused resources.

You can configure Unused resources operations by selecting **Settings**.

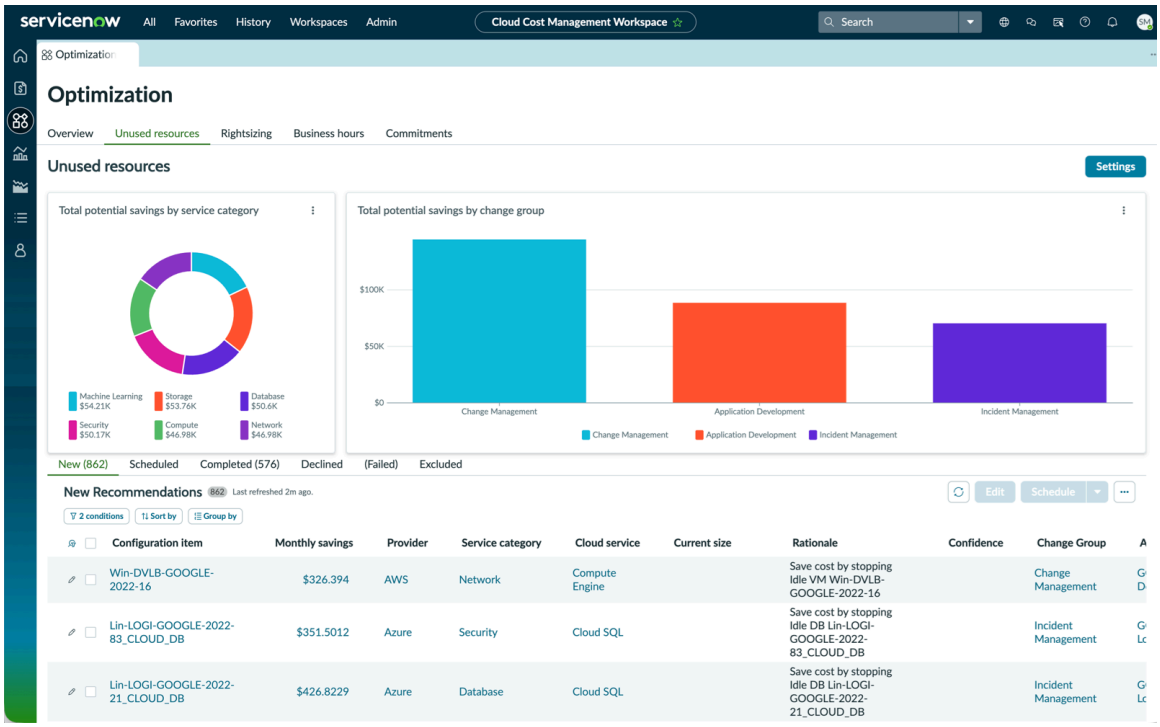


Chart	Description
Total potential savings by service category	Total savings to expect if all Unused resources recommendations are applied by service category such as Compute, Database, and Storage.
Total potential savings by change group	Total savings to expect if all Unused resources recommendations are applied by change group such as Change Management and Application Development.

Recommendation tab	Description	Available actions on selected recommendations
New	Resources that are candidates for Unused resources. Each successful execution of a Billing Download job triggers the Budget Forecast, Business Hours, Reservation Plans,	• Schedule • Exclude

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Recommendation tab	Description	Available actions on selected recommendations
	Rightsizing, and Unused resources jobs to analyze the spend and usage data of resources and to update the actionable recommendations in reports. **Note:** Microsoft Azure only: The Azure Advisor service generates the recommendations that appear in Rightsizing and Unused resources reports. Cloud Cost Management doesn't generate the recommendations.	
Scheduled	Resources that are scheduled in Unused resources jobs.	• Reschedule • Remove from Job
Completed	Resources that the Unused resources job terminated or stopped.	None
Declined	Resources for which owners didn't want to perform any action or declined the change request.	• Reschedule • Exclude
Failed	Resources for which the Unused resources operation wasn't successful.	• Reschedule • Exclude **Note:** If you perform any action on the terminated or stopped virtual machines, the recommendations get completed but don't show up in the Failed recommendations tab.
Excluded	Resources that are configured not to be considered for Unused resources.	Remove from exclusion

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Columns on the New, Scheduled, Declined, Completed, and Failed Recommendations tabs

Column	Description
Configuration item	Unique identifier of the resource.
Monthly savings	Potential savings if the resource is resized to the recommended size.
Provider	The provider that hosts the resource.
Service category	Lists all service categories from the instance sorted by name.
Cloud service	Lists all cloud categories sorted by#name.
Current size	Size of the resource that was analyzed for.
Rationale	The reason that the system recommends terminating or stopping. • AWS: Cloud Cost Management analysis of provisioning and usage levels over the last 14 days. • Microsoft Azure: Recommendation from the Azure Advisor service.
Confidence	The confidence level in a recommendation. • High confidence requires the following conditions: ○ The system has at least 10 days of usage data for the resource. ○ The current and recommended family or generation is identical. • Medium confidence requires the following conditions: ○ The system has less than 10 days of usage data for the resource. ○ The current and recommended family or generation is identical. • Low confidence: The current and recommended family/generation are different.
Change Group	Change group for the resource.
Account	The service account that includes the resource. A service account represents a group of related regions in your provider account.
Region	If appropriate for the provider, region in the service account that hosts the resource.
Owned by	Owner of the resource.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Columns on the New, Scheduled, Declined, Completed, and Failed Recommendations tabs (continued)

Column	Description
Source	Source of the recommendations. • AWS / Azure / GCP: Provider-generated recommendations • ServiceNow: Custom-generated recommendations

Configure Unused resources operations

The Unused resources feature recommends termination or power-off for resources that are wasting money because they aren't being used. Configure Unused resources processes and specify the potential savings that trigger notifications.

Before you begin

Run Discovery on each service account.

Ensure that the Billing Download job has completed for each provider.

Ensure that the Price Sheet Download job has completed for each provider.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner].

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Optimization** > **Unused resources**.
2. Select **Settings**.
3. On the form, fill in the fields.

Unused Machine Settings

Field	Value
Enable Unused Machines	Option for enabling Unused resources activities. This field is automatically enabled.
Advanced	Option to specify non-default change templates.
Auto pause interval	Indicates the minimum idle time for the Azure SQL database in minutes. Default: 60 minutes
Maximum age for snapshots in AWS/Azure/ Google (days)	Age of the snapshot. The snapshot data is displayed in the **Rationale** column in the **Recommendations** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	Default: 90 days
Notify when potential unused savings exceed (%) of total spend	Percentage of overall cloud spend on unused resources that triggers an email notification to the users or groups that you specify. The value is calculated using the amount that could be saved if all Unused resources recommendations are applied. Default: 15% The default value of 15 means that notifications are sent only when the cost of operation for unused resources is greater than 15% of total costs.
Notify users / Notify groups	Users or groups to notify by email when the spend for unused resources exceeds the specified percentage of overall cloud spend. For information on configuring the email, see Create an email template.
Auto-approval (Standard Change)	
Script include	This field appears only when the **Advanced** check box is selected. `CLINRSStandardChangeRequestUtil` Script include to use for change requests when a resource matches a policy of the specified type. The Change group is derived from the Standard Change template and can't be overridden.
Manual approval (Normal Change)	
Script include	This field appears only when the **Advanced** check box is selected. `CLINRSNormalChangeRequestUtil`

4. Select **Save**.

Related topics

Change Management

Schedule unused resources to be powered off or terminated

To terminate or power off an unused resource, add it to an Unused resources job, specify whether to terminate or power off, and specify when the job should run. You can also move resources from one scheduled job to a different job.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Run Discovery on each service account.

Ensure that the Billing Download job has completed for each provider.

Ensure that the Price Sheet Download job has completed for each provider.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner]

About this task

Important: After an Unused resources job powers off or terminates a machine, the machine is added to the Excluded Resources list for Business Hours. This process ensures that the resource isn't started again in the future because it matches a Business Hours policy. The exclusion reason on the Business Hours **Excluded Resources** tab indicates that the resource is an unused resource.

When you change the resources that are included in a job, the app checks for the following conditions:

- A resource in the job is owned by another user (as when a insights_admin updates a job that was created by an insights_owner or an insights_owner updates a job that was created by a different insights_owner).
- The job was created by another user.

If either condition is met, the app sends an email notification to the owner of the resource or the creator of the job.

Important: Starting with Cloud Cost Management v11.0.0, the `sn_change_write` role is no longer inherited by the insights_admin and insights_owner roles. Both roles now inherit the `sn_change_read` role instead. As a result, users with these roles can view change requests that are created when a recommendation is scheduled, but they can't create change requests directly. To schedule recommendations, configure a change creator user before using the Recommendations module. For more information, see.

Procedure

1. Navigate to *`Cloud Cost Management Workspace`* > **Optimization** > **Unused resources**.
2. In the list on the appropriate tab, select the check boxes for the resources to terminate.
   - To create an Unused resources job for resources that are new candidates for termination: On the **New Recommendations** tab, select the resources and then select **Schedule Job**.
   - To create a job for resources that had previously been scheduled but the action wasn't completed successfully: On the **Declined Recommendations** tab or the **Failed Recommendations** tab, select the resources and then select **Reschedule**.

   Note: Microsoft Azure only: The Azure Advisor service generates the recommendations that appear in Rightsizing and Unused resources reports. Cloud Cost Management doesn't generate the recommendations.

3. In the dialog box, fill in the fields.

Field	Value
Job Type	Type of job action.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	Select **Schedule job**.
Job name	Unique and descriptive name for the Unused resources job.
Action	The action to take on the selected resources: ○ **Power off machine**: Power off triggers a Microsoft Azure process called deallocation to set the resource as Stopped (Deallocated). ○ **Terminate machine**: Terminated machines can't be recovered. ○ **Terminate machine and delete storage**: If the root volume isn't automatically deleted when the VM is terminated, the job deletes the root volume. No other volumes are deleted. **Note:** Terminated resources or deleted volumes can't be recovered.
Schedule	Date and time to run the Unused resources job.
Approval type	Type of change request to use. Unused Machines operations are directly integrated with the ServiceNow® Change Management feature. ○ **Auto approval (Standard Change)**: Generates and auto-approves a change request to terminate or stop the resource. The system also sends the approved change request to the change group. The resource is added to the list of resources that the job terminates or stops. ○ **Manual approval (Normal Change)**: Generates a change request (Normal Change type) for a member of the change group to terminate or stop the resource and continues to list the resource in the appropriate Unused resources reports. ▪ Until a member of the change group approves/rejects the change, the resource state is set to Pending, the resource remains listed on reports, and no other action is taken.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	▪ If a member of the change group approves the request, the state is set to **Approved** and the resource is added to the list of resources that the job terminates or stops. ▪ If a member of the change group rejects the request, the resource state is set to **Declined**, the resource remains listed on reports, and no action is taken. **Note:** The **Short description**, **Description**, **Assignment group**, and **Affected CIs** fields are auto populated. For more information, see Create a change request.
Change template	This field appears only when the **Approval type** is selected as **Auto approval**. Change request template (Standard Change type) to be used. If no template appears in the list, you must create one. See Create a change request template.

4. Select **Submit**.

Result
The Unused resources job is created and runs at the scheduled time.

Related topics
- Change Management
- Standard change catalog
- Create a change request template
- Exclude a resource from all Cloud Cost Management reports

Move a resource to a different Unused resources job

You can add resources to a currently scheduled job, move resources from one job to another, or remove resources from a job.

Before you begin
Run Discovery on each service account.

Ensure that the Billing Download job has completed for each provider.

Ensure that the Price Sheet Download job has completed for each provider.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner].

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

When you change the resources that are included in a job, the app checks for the following conditions:

- A resource in the job is owned by another user (as when a insights_admin updates a job that was created by an insights_owner or an insights_owner updates a job that was created by a different insights_owner).
- The job was created by another user.

If either condition is met, the app sends an email notification to the owner of the resource or the creator of the job.

Procedure

1. Navigate to *`Cloud Cost Management Workspace`* > **Optimization** > **Unused resources**.
2. In the list on the appropriate tab, select the check boxes for the resources to terminate.
   - To create an Unused resources job for resources that are new candidates for termination: On the **New Recommendations** tab, select the resources and then select **Schedule Job**.
   - To create a job for resources that had previously been scheduled but weren't resized: On the **Declined Recommendations** tab or the **Failed Recommendations** tab, select the resources and then select **Reschedule**.

   Note: Microsoft Azure only: The Azure Advisor service generates the recommendations that appear in Rightsizing and Unused resources reports. Cloud Cost Management doesn't generate the recommendations.

3. In the dialog box, fill in the fields.

Field	Value
Job Type	Type of job action. Select **Add to job**.
Job name	Unique and descriptive name for the Unused resources job.
Action	The action to take on the selected resources: ○ **Power off machine**: Power off triggers a Microsoft Azure process called deallocation to set the resource as Stopped (Deallocated). ○ **Terminate machine**: Terminated machines can't be recovered. ○ **Terminate machine and delete storage**: If the root volume isn't automatically deleted when the VM is terminated, the job deletes the root volume. No other volumes are deleted. **Note:** Terminated resources or deleted volumes can't be recovered.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Schedule	Date and time to run the Unused resources job.
Approval type	Type of change request to use. Unused Machines operations are directly integrated with the ServiceNow® Change Management feature. ○ **Auto approval (Standard Change)**: Generates and auto-approves a change request to terminate or stop the resource. The system also sends the approved change request to the change group. The resource is added to the list of resources that the job terminates or stops. ○ **Manual approval (Normal Change)**: Generates a change request (Normal Change type) for a member of the change group to terminate or stop the resource and continues to list the resource in the appropriate Unused Machines reports. ▪ Until a member of the change group approves/rejects the change, the resource state is set to Pending, the resource remains listed on reports, and no other action is taken. ▪ If a member of the change group approves the request, the state is set to **Approved** and the resource is added to the list of resources that the job terminates or stops. ▪ If a member of the change group rejects the request, the resource state is set to **Declined**, the resource remains listed on reports, and no action is taken.
Change template	This field appears only when the **Approval type** is selected as **Auto approval**. Change request template (Standard Change type) to be used. If no template appears in the list, you must create one. See Create a change request template.

4. Select **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Exclude a resource from Unused resources analysis

To ensure that a particular resource is not considered or recommended for Unused resources, add the resource to the Excluded Resources list. The system continues to collect cost and usage data but does not consider the resource for the processes of Unused resources.

Before you begin

Run Discovery on each service account.

Ensure that the Billing Download job has completed for each provider.

Ensure that the Price Sheet Download job has completed for each provider.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner].

About this task

When you change the resources that are included in a job, the app checks for the following conditions:

- A resource in the job is owned by another user (as when a insights_admin updates a job that was created by an insights_owner or an insights_owner updates a job that was created by a different insights_owner).
- The job was created by another user.

If either condition is met, the app sends an email notification to the owner of the resource or the creator of the job.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Optimization** > **Unused resources**.
2. On the New, Declined, or Failed tabs, select the resources that you want to exclude from unused resources analysis.
3. Select **Exclude**.
   The resources are added to the Excluded Resources list. To remove a resource from the list, select the resources from the **Excluded** tab and then select **Remove From Exclusion**.

Related topics

Exclude a resource from all Cloud Cost Management reports

View or edit scheduled and completed Unused resources jobs

View and manage the upcoming and completed Unused resources jobs.

Before you begin

Role required: insights_admin or insights_owner

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Optimization** > **Unused resources**.
2. Select the **Scheduled** or **Completed** tab.
3. In the **Job** column, select a job to view the details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cloud Insights Job

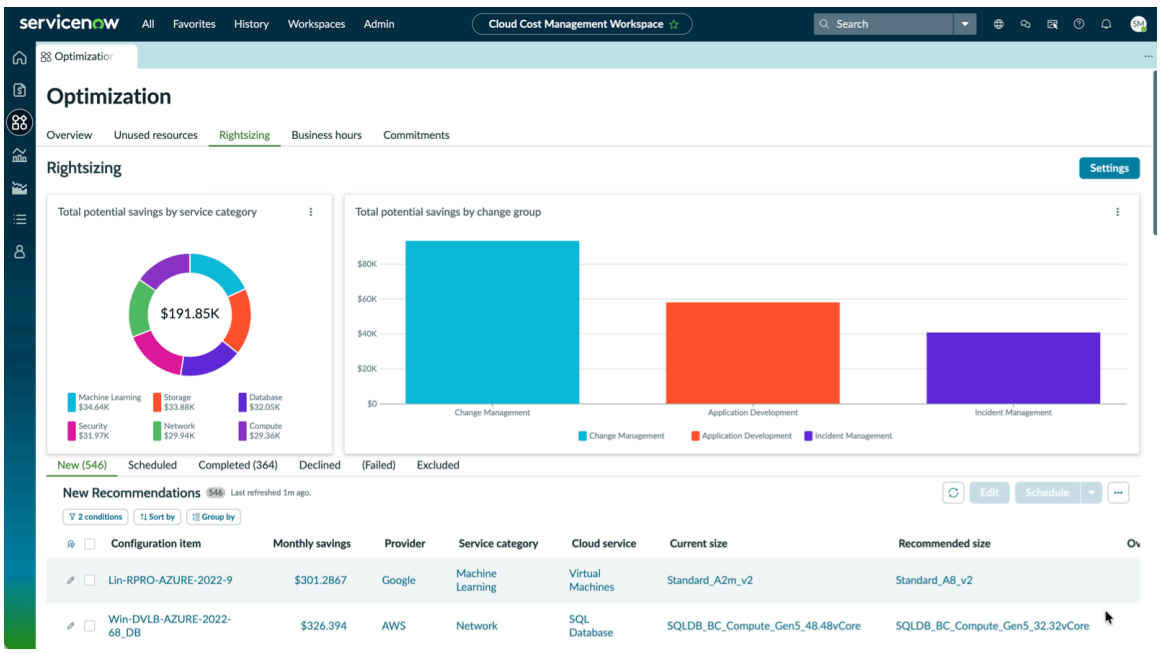
Field	Description
Approval type	The type of approval that is specified for the job, such as Auto-approval (Standard Change) or Manual approval (Normal Change).
Job status	Status of the job execution.
Name	Name of the scheduled job.
Job Action	The action that is specified for Unused resources jobs.
Standard change template	The used change request template (Standard Change type).
Job owner	Owner of the Unused resources job.
Action	Action taken for the unused resource such as Terminate.
Planned date	Time that the job ran or will run. You can edit the date.

4. Select **Save**.

Resize resources with Rightsizing

Gain better visibility of resource usage by identifying your over-provisioned or underused resources, configuring rightsizing operations, implementing rightsizing recommendations, and performing various rightsizing operations.

You can configure Rightsizing operations by selecting **Settings**.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Chart	Description
Total potential savings by service category	Total savings to expect if all rightsizing recommendations are applied by service category such as Compute, Database, and Storage.
Total potential savings by change group	Total savings to expect if all rightsizing recommendations are applied by change group such asChange Management and Application Development.

Recommendations tab	Description	Available actions on selected recommendations
New	Resources that are candidates for Rightsizing. Each successful execution of a Billing Download job triggers the Rightsizing jobs to analyze spend and usage data and to update the actionable recommendations in reports.	• Exclude • Schedule
Scheduled	Resources that are scheduled in Rightsizing jobs.	• Reschedule • Remove
Declined	Resources that owners didn't want to resize (declined the change request).	• Exclude • Reschedule
Completed	Resources that were rightsized by the Rightsizing job.	None
Failed	Resources for which the Rightsizing operation wasn't successful. For failed attempts, the Rightsizing operation performs a rollback as described in AWS only – Rollback on failed Rightsizing attempts.	• Exclude • Reschedule
Excluded	Resources that are configured not to be considered for Rightsizing.	Remove from exclusion

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Columns on the New, Scheduled, Declined, Completed, and Failed Recommendations tabs

Column	Description
Configuration item	Unique identifier of the resource.
Monthly savings	Potential savings if the resource is resized to the Recommended size.
Provider	The provider that hosts the resource.
Service category	Lists all service categories from the instance sorted by name.
Cloud service	Lists all cloud categories sorted by#name.
Current size	Size of the resource that was analyzed for Rightsizing, the size that you're currently paying for.
Recommended size	• AWS: The size that is operationally and cost-wise most appropriate for the resource, based on the analysis of provisioning and usage levels over the last 14 days. • Microsoft Azure: Recommendation from the Azure Advisor service.
Override size	Size to use instead of the recommended size. By default, the system uses the Recommended size when Rightsizing. Specify a different size by specifying an Override size.
Rationale	The reason that the system recommends resizing. • AWS: Based on Cloud Cost Management analysis of provisioning and usage levels over the last 14 days. • Microsoft Azure: Recommendation from the Azure Advisor service.
Confidence	The confidence level in a recommendation. • High confidence requires the following conditions: ○ The system has at least 10 days of usage data for the resource. ○ The current and recommended family or generation is identical. • Medium confidence requires the following conditions:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Columns on the New, Scheduled, Declined, Completed, and Failed Recommendations tabs (continued)

Column	Description
	○ The system has less than 10 days of usage data for the resource. ○ The current and recommended family or generation is identical. • Low confidence: The current and recommended family/generation are different.
Account	The service account that includes the resource. A service account represents a group of related regions in your provider account.
Region	If appropriate for the provider, region in the service account that hosts the resource.
Owned by	Owner of the resource.
Change group	Change group for the resource.
Source	Source of the recommendations. • AWS / Azure / GCP: Provider-generated recommendations • ServiceNow: Custom-generated recommendations
State	For resources that match an Auto-approval (Standard Change) approval type, status of the change request.
Job	Name of the Rightsizing job that the resource is part of.
Planned date	Date that the job is scheduled to run.
Change request	The change request that is associated with the recommendation.

Configure Rightsizing operations

Configure Rightsizing processes and specify the amount of potential rightsizing savings that triggers notifications.

Before you begin

Run Discovery on each service account.

Ensure that the Billing Download job has completed for each provider.

Ensure that the Price Sheet Download job has completed for each provider.

Role required: insights_admin or insights_owner

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Cloud Cost Management Workspace** > **Optimization** > **Rightsizing**.
2. Select **Settings**.
3. On the form, fill in the fields.

Rightsizing Settings

Field	Value
Enable Rightsizing	Option for enabling Rightsizing activities. Clearing the check box disables Rightsizing. Default: Enabled This field is automatically enabled.
After resize, exclude resource for (days)	Number of days to place a resized resource in the Excluded Resources list. During this monitoring period, you can't remove the resource from the Excluded Resources list. Cloud Cost Management monitors resized resources for the specified period to verify that the new size is appropriate. When the period expires, the resource is removed from the list and rightsizing analysis resumes. **Note:** Microsoft Azure only: The Azure Advisor service begins to analyze usage and may again recommend resizing after seven days regardless of this setting. If you specify a value greater than seven days, the Cloud Cost Management doesn't report the Azure Advisor recommendation for the time period that you specify. Minimum value: 7
Do not recommend if savings are below threshold	Minimum cost over a 30-day period to use when deciding whether to rightsize. For example, a setting of ¥100 means that Cloud Cost Management ignores any rightsizing recommendation that would result in less than ¥100 in savings over 30 days.
Notify when potential rightsizing savings exceed (%) of total spend	Percentage of overall cloud spend for resources that are sized incorrectly that should trigger an email notification to the users or groups that you specify. The value is calculated using the amount that could be saved if all rightsizing recommendations are followed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	Default: 15% The default value of **15** means that notifications are sent only when the cost of non-rightsized resources is greater than 15% of total costs.
Notify users / Notify groups	Users or groups to notify by email when the spend for incorrectly sized resources exceeds the specified percentage of overall cloud spend. For information on configuring the email, see Create an email template.
Advanced	Option for specifying non-default change templates for generating change requests.
Auto-approval (Standard Change)	
Script include	This field appears only when the **Advanced** check box is selected. `CLINRSStandardChangeRequestUtil`: The Change group is derived from the Standard Change template and can't be overridden.
Manual Approval (Normal Change)	
Script include	This field appears only when the **Advanced** check box is selected. `CLINRSNormalChangeRequestUtil`: Manual approval or Normal Change policies.

4. Select **Save**.

Specify rate discounts to enable accurate pricing for Rightsizing recommendations

Specify the provider's discount rate for each service account to enable Rightsizing calculations. To generate accurate recommendations, the system analyzes 14 days of usage data, applies price sheet rates, and appropriate discounts.

Before you begin

Role required: Insights admin (sn_clin_core.insights_admin)

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **AWS price discounts**.
2. Select **New**.
3. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AWS Price Discount

Field	Description
Service account	The service account that the specified discount applies to.
Discount (%)	The percentage discount for the selected service account.

4. Select **Save**.

What to do next

View the provider's discount rate for each service account by navigating to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **AWS price discounts**.

Related topics

Schedule and manage the Cloud Cost Management jobs that download AWS price sheets

Define a metric threshold

To enable accurate memory usage data for use in generating Rightsizing recommendations, you first define memory metrics in your account. You then define a custom memory metric in Cloud Cost Management.

Before you begin

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner]

- Run Discovery on each service account.
- Verify that the Billing Download and Price Sheet Download job has been completed successfully.

About this task

Note: You can configure the memory threshold for AWS and Azure only.

AWS doesn't automatically collect memory metric statistics. On the AWS Management Console, you specify the statistics to collect and push the data to Amazon CloudWatch. Cloud Cost Management accesses the data through CloudWatch, and verifies that the combination of namespace and metric name is defined correctly. To recommend resources for Rightsizing, Cloud Cost Management analyzes the memory usage data for the custom metric. If no data is returned, the analysis uses the maximum memory of the resource.

Procedure

1. Navigate to **Cloud Cost Management Workspace** > **Optimization** > **Rightsizing**.
2. Select **Settings**.
3. Select the **Service category metric** tab.
4. Select **New**.
5. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Metrics Configuration

Field	Description
Provider	Name of the service provider. ○ AWS ○ Azure
Service Category	Service category for the provider. ○ Compute ○ Database **Note:** ○ For AWS, recommendations are generated only on CPU usage (Compute). ○ For Azure, recommendations are generated based on CPU, Memory, and Network usage (Compute and Database).
Service Accounts	Service accounts for the selected provider.
Aggregation Type	Metric statistics received in time intervals. ○ Avg ○ Min ○ Max
Metric Type	Type of the metric statistic. ○ CPU ○ Memory ○ Network
Threshold (%)	Threshold value used while generating Rightsizing recommendations. **Note:** If **Provider** is selected as **AWS**, **Service Category**is selected as **Database**, and **Metric Type** is selected as **Network**, the value shows up as an integer.

6. Select **Save**.

Schedule resources to be rightsized

To rightsize a resource, add it to a Rightsizing job and specify when the job should run. You can also move resources out of one scheduled job into a different job or remove a resource from a job.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Run Discovery on each service account.

Ensure that the Billing Download has completed for each provider.

Ensure that the Price Sheet Download job has completed for each provider.

Role required: insights_admin or insights_owner

About this task

Important: Starting with Cloud Cost Management v11.0.0, the `sn_change_write` role is no longer inherited by the insights_admin and insights_owner roles. Both roles now inherit the `sn_change_read` role instead. As a result, users with these roles can view change requests that are created when a recommendation is scheduled, but they can't create change requests directly. To schedule recommendations, configure a change creator user before using the Recommendations module. For more information, see.

When you change the resources that are included in a job, Cloud Cost Management checks for the following conditions:

- A resource in the job is owned by another user (for example, when an insights_admin updates a job that was created by an insights_owner or an insights_owner updates a job that was created by a different insights_owner).
- The job was created by another user.

If either condition is met, the app sends an email notification to the owner of the resource or the creator of the job.

Note: If a recommendation to rightsize a Google Cloud resource is dismissed from the Google Cloud management portal, the resource doesn't appear in Rightsizing recommendations.

Procedure

1. Navigate to *`Cloud Cost Management Workspace`* > **Optimization** > **Rightsizing**.
2. In the list on the appropriate tab, select the check boxes for the resources to rightsize.
   - To create a Rightsizing job for resources that are new candidates for rightsizing: On the **New Recommendations** tab, select resources and then select **Schedule**.
   - To create a new job for resources that had previously been scheduled but were not resized: On the **Declined Recommendations** tab or the **Failed Recommendations** tab, select resources and then select **Reschedule**.
3. In the dialog box, fill in the fields.

Schedule job

Field	Value
Job type	Type of job action. Select **Schedule job**.
Job name	Unique and descriptive name for the Rightsizing job.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
Schedule	Date and time to run the Rightsizing job.
Approval type	Type of change request to use. ○ **Auto approval**: Generates and auto-approves a change request to resize the resource. The system also sends the approved change request to the change group. The resource is added to the list of resources that the job will resize. ○ **Manual approval**: Generates a change request (Normal Change type) for a member of the change group to resize the resource and continues to list the resource in the appropriate Rightsizing reports. **Note:** The **Short description**, **Description**, **Assignment group**, and **Affected CIs** fields are auto populated. For more information, see Create a change request.
Change template	This field appears only when the **Approval type** is selected as **Auto approval**. Change request template (Standard Change type) to be used. If no template appears in the list, you must create one. See Create a change request template.

4. Select **Submit**.

Result

The Rightsizing job is created and will run at the scheduled time.

- Until a member of the change group approves or rejects the change, the resource state is set to **Pending**. The resource remains listed on reports and no other action is taken.
- If a member of the change group approves the request, the state is set to **Approved**. The resource is added to the list of resources that the job will resize.
- If a member of the change group rejects the request, the resource state is set to **Declined**. The resource remains listed on reports and no action is taken.

Related topics

Change Management

Standard change catalog

Create a change request template

Exclude a resource from all Cloud Cost Management reports

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Move a resource to a different Rightsizing job

You can add resources to a currently scheduled job, move resources from one job to another, or remove resources from a job.

Before you begin

Run Discovery on each service account.

Ensure that the Billing Download job has completed for each provider.

Ensure that the Price Sheet Download job has completed for each provider.

Role required: insights_admin or insights_owner

About this task

When you change the resources that are included in a job, the app checks for the following conditions:

- A resource in the job is owned by another user (as when a insights_admin updates a job that was created by an insights_owner or an insights_owner updates a job that was created by a different insights_owner).
- The job was created by another user.

If either condition is met, the app sends an email notification to the owner of the resource or the creator of the job.

Procedure

1. Navigate to *`Cloud Cost Management Workspace`* > **Optimization** > **Rightsizing**.
2. In the list on the appropriate tab, select the check boxes for the resources to rightsize.
   - On the **New Recommendations** tab, select **Schedule**.
   - On the **Declined Recommendations** tab or the **Failed Recommendations** tab, select **Reschedule**.
3. In the dialog box, fill in the fields.

Schedule job

Field	Value
Job type	Type of job action. Select **Add to job**.
Job name	Unique and descriptive name for the Rightsizing job.
Schedule	Date and time to run the Rightsizing job.
Approval type	Type of change request to use. ○ **Auto approval**: Generates and auto-approves a change request to resize the resource. The system also sends the approved change request to the change

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	group. The resource is added to the list of resources that the job will resize. ○ **Manual approval**: Generates a change request (Normal Change type) for a member of the change group to resize the resource and continues to list the resource in the appropriate Rightsizing reports.
Change template	This field appears only when the **Approval type** is selected as **Auto approval**. Change request template (Standard Change type) to be used. If no template appears in the list, you must create one. See Create a change request template.

4. Select **Submit**.

Exclude a resource from Rightsizing analysis

To ensure that a particular resource is not considered or recommended for Rightsizing, add the resource to the Excluded Resources list. The system continues to collect cost and usage data but does not consider the resource for Rightsizing.

Before you begin

Run Discovery on each service account.

Ensure that the Billing Download job has completed for each provider.

Ensure that the Price Sheet Download job has completed for each provider.

Role required: insights_admin or insights_owner

About this task

When you change the resources that are included in a job, the app checks for the following conditions:

- A resource in the job is owned by another user (as when a insights_admin updates a job that was created by an insights_owner or an insights_owner updates a job that was created by a different insights_owner).
- The job was created by another user.

If either condition is met, the app sends an email notification to the owner of the resource or the creator of the job.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Optimization** > **Rightsizing**.
2. On the New, Declined, or Failed tabs, select the resources that you want to exclude from rightsizing analysis.
3. Select **Exclude**.
   The resources are added to the Excluded Resources list. To remove a resource from the list, select the resources from the **Excluded** tab and then select **Remove From Exclusion**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Exclude a resource from all Cloud Cost Management reports

View or edit scheduled and completed Rightsizing jobs

View and manage the upcoming and completed Rightsizing jobs.

Before you begin

Role required: insights_admin or insights_owner

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Optimization** > **Rightsizing**.
2. Select the **Scheduled** or **Completed** tab.
3. In the **Job** column, select a job to view the details.

Cloud Insights Job

Field	Description
Approval type	The type of approval that is specified for the job, such as Auto-approval (Standard Change) or Manual approval (Normal Change).
Job status	Status of the job execution.
Name	Name of the scheduled job.
Job Action	The action that is specified for Rightsizing jobs.
Standard change template	The used change request template (Standard Change type).
Job owner	Owner of the Rightsizing job.
Action	Action taken for the resource such as Resize.
Planned date	Time that the job ran or will run. You can edit the date.

4. Select **Save**.

Improve resource usage with Business hours

Improve resource usage and reduce your cloud spend by running resources during the specified business hours.

Use the Business hours recommendation page to:

- Manage Business hours processes.
- Configure Business hours operations by selecting **Settings**.
- Define or update Business hours processes

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

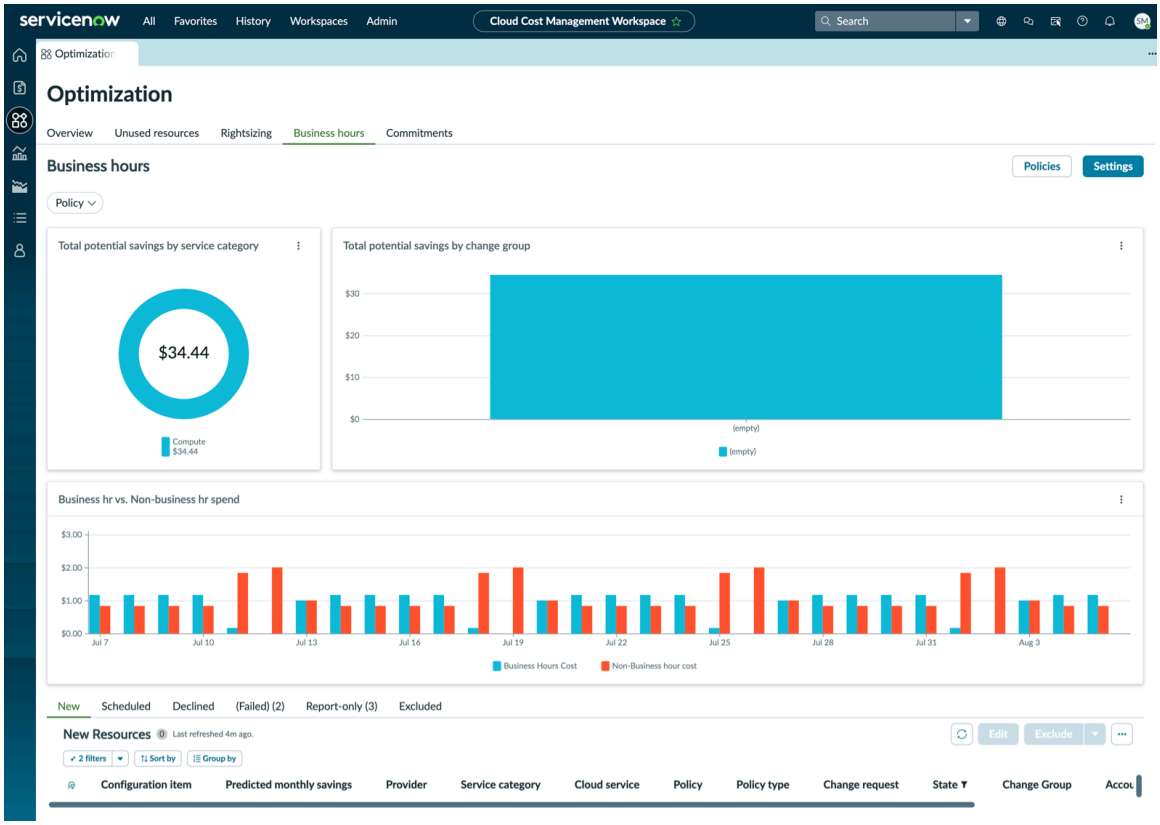


Chart	Description
Total potential savings by service category	Total savings to expect if all Business hours recommendations are applied by service category such as Compute and Database.
Total potential savings by change group	Total savings to expect if all Business hours recommendations are applied by change group such as Change Management and Application Development.
Business hr vs. Non-business hr spend	Spend for resources during business hours against non-business hours.

Tab	Description	Available action on selected recommendations
New	Resources that are candidates for applying Business hours processes.	Exclude
Scheduled	Resources that are tagged to have business hours enforced.	None
Declined	Resources for which owners (or other approver) didn't want to enforce business hours (rejected the change request).	Exclude

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tab	Description	Available action on selected recommendations
Failed	Resources for which the attempt to enforce business hours failed.	Exclude
Report-only	Resources that match Report-only policies.	Exclude
Excluded	Resources that are configured not to be considered for business hours. **Important:** After an Unused resources job powers off a machine, the machine is added to the Excluded Resources list for Business Hours. This process ensures that the resource isn't started again in the future because it matches a Business hours policy. The exclusion reason on the Business hours **Excluded** tab indicates that the resource is an unused resource.	Remove from exclusion

Columns on the New, Scheduled, Declined, Failed, and Report-only Recommendations tabs

Column	Description
Configuration item	Unique identifier of the resource.
Predicted monthly savings	Predicted savings if the Business hours recommendations are applied.
Provider	The provider that hosts the resource.
Service category	Lists all service categories from the instance sorted by name.
Cloud service	Lists all cloud categories sorted by#name.
Policy	The Business hours policy that the resource matches to.
Policy type	Type of the Business hours policy that the resource matches to.
Change request	Change request that is associated with the recommendation.
Change Group	Change group for the resource.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Columns on the New, Scheduled, Declined, Failed, and Report-only Recommendations tabs (continued)

Column	Description
Account	The service account that includes the resource. A service account represents a group of related regions in your provider account.
Region	If appropriate for the provider, region in the service account that hosts the resource.
Owned by	Owner of the resource.
Failure type	This column appears only for the Failed tab. Reason for which the change request wasn't generated or the specified business hours weren't applied to the resource.
Details	This column appears only for the Failed tab. Details of the failure type and the action that you must take to resolve the failure.

Configure Business hours operations

Enable or disable the Business hours feature and set a non-business-hour spend threshold to trigger notifications to users or groups. This action helps control unnecessary resource usage and reduce costs.

Before you begin

A cloud account (parent account) that has at least one service account and associated datacenters is required.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner] for owned service accounts.

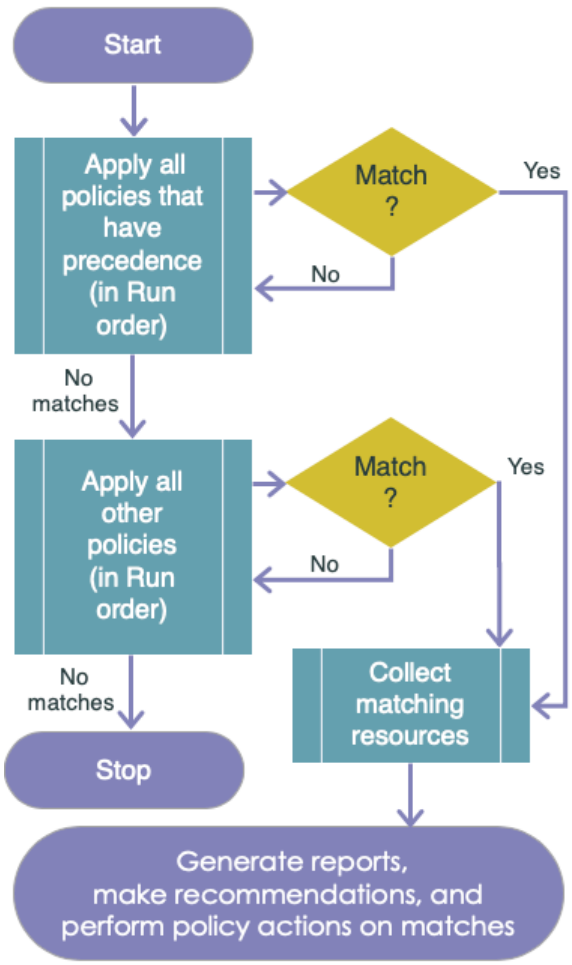
Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Optimization** > **Business hours**.
2. Select **Settings**.
3. On the form, fill in the fields.

Business Hours Settings

Field	Description
Enable business hours	Option for enabling the Business hours feature. All active policies are applied when data becomes available. Deselect the check box to disable the Business hours feature. No policies are applied regardless of the **Active** setting for a policy.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: When you disable the Business hours feature, all schedules that were applied by policies are deactivated and resources return to their original schedules.
Precedence	The role that should have precedence when policies are applied. Select one of the following: ○ Admin Policies ○ Owner Policies Precedence determines the order in which batches of policies are applied. Each batch is based on the role of the user who created the policy — insights_admin or insights_owner. After a match, no other policy is applied to the resource. Default: **Admin Policies** (The set of policies that were created by users with the insights_admin role.) 

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Advanced	Option to generate a single change request that applies to all CIs that match a policy (default setting) or a separate change request for each CI. Some attributes of the change request template have static/constant values that cannot be changed. Some attributes (for example, risk and work_notes) have dynamic values that you can set using a script include.
Auto-approval (Standard Change)	
Single change request	Option for enabling the system to generate a single change request, which applies to all CIs that match the policy.
Script include	This field appears only when the **Advanced** check box is selected. `CLINBHStandardChangeRequestUtil` The Change group is derived from the Standard Change template and cannot be overridden.
Manual approval (Normal Change)	
Single change request	Option for enabling the system to generate a single change request, which applies to all CIs that match the policy.
Script include	This field appears only when the **Advanced** check box is selected. `CLINBHNormalChangeRequestUtil`
Notify when non-business hour spend exceeds (%) of total spend	Percentage of overall cloud spend on resources during business hours that triggers email notification to the users or groups that you specify. Default: 15 The value is calculated using the amount that could be saved if all Business hours recommendations are applied. The default value of 15 means that notifications are sent only when the cost of operation during non-business hours is greater than 15% of total costs.
Notify when unassigned resources exceed (%) of total CIs	The percentage of overall cloud spend for non-business hour usage that triggers email notification of the users or groups that you specify.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	The default value of **15** means that notifications are sent only when the cost of operation during non-business hours is greater than 15% of total costs.
Notify users / Notify groups	The users or groups to notify by email when the non-business hour spend exceeds the specified percentage of overall cloud spend. If you don't specify users or groups, then no notification is sent.
Maximum CIs per change	This field appears only when the **Single change request** check box is selected in the **Manual approval (Normal Change)** section. Maximum number of resources to associate with a single change request. If the maximum is reached, the system generates a new change request. Default value: 1000

4. Select **Save**.

Related topics

Change Management

Create Business hours schedule

Create and apply a Business hours schedule to the cloud resources for enforcing the on/off schedule.

Before you begin

Role required: insights_admin or insights_owner

About this task

Important: Starting with Cloud Cost Management v11.0.0, the `sn_change_write` role is no longer inherited by the insights_admin and insights_owner roles. Both roles now inherit the `sn_change_read` role instead. As a result, users with these roles can view change requests that are created when a recommendation is scheduled, but they can't create change requests directly. To schedule recommendations, configure a change creator user before using the Recommendations module. For more information, see.

Procedure

1. Navigate to *`Cloud Cost Management Workspace`* > **Operations** > **Administration** > **Business hours schedules**.
2. Select **New**.
3. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Schedule

Field	Description
Name	Unique name for the schedule.
Time zone	Time zone for the schedule. Default value: Floating, which means that the time zone is relative to whatever process is accessing the item at the time. When a schedule is defined in a time zone, users in different time zones see the schedule with their own time zone applied.
Parent	Parent schedule that constraints the new schedule.
Application	Application scope of the schedule. Default value: Cloud Insights Core
Type	Text label that describes the purpose of the schedule.
Description	Description of the schedule.

4. Select **Save**.

Define or update a Business hours policy

A Business hours job applies policies to identify resources running outside the specified hours, reports them, and manages the start and stop of resources on a specified schedule. Running only during specified business hours can significantly reduce your cloud spend.

Before you begin

Required: A cloud account (parent account) that has at least one service account or project that has associated datacenters.

A Billing Download Job must be defined.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner] for owned service accounts.

About this task

Important: A resource matches the policy if all criteria in the Service Account and Resource Criteria section are met.

- You must select one of the Cloud Cost Management application scopes to create or update a Business hours policy.
- You can create as many policies as needed.
- You can't change the provider while editing an existing policy.
- When you deactivate a Business Hours policy, the resources that met the policy criteria might match a different policy (the matching policy with lowest run order) and therefore move to another schedule. In this case, the system generates a new change request. If a resource no longer meets any policy, the system attempts to power on the resource using the specified **Power-on flow** setting.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Optimization** > **Business hours**.
2. Select **Policies**.
   When a policy is created or updated with changes other than to its name or description, a notification appears on the tab. Select **Apply policies** to apply the updated policy and recalculate the reported data.
3. Select **New/Edit** to create a policy.
   You can edit an existing policy by selecting a policy name from the **Business Hours Policies** list.
4. On the form, fill in the fields.

Business Hours Policy Creation form

Field	Value
Select business hours policy to edit	The business hour policy that you want to edit.
Active	The option to apply the policy. Selecting the **Active** check box enables Business hours analysis whenever billing data is updated.
Policy name	A unique name that describes the policy for other users.
Description	A brief description of the policy.
Run order	The order in which to apply policies. Each policy must have a unique value. The system applies policies in low-to-high run order and performs the actions for the first policy that matches. After a match, no other policy is applied to the resource. **Important:** The system applies two batches of policies in the precedence order that you specify: Policies created by Admins and policies created by Insights Owners. See the **Precedence** setting in Configure Business hours operations. Run order values for Unassigned Resources policies and Business hours policies don't interfere with each other.
Provider	The cloud provider to apply the policy to. **Note:** You can't change the provider while editing an existing policy.
Service category	List of all service categories that the policy applies to.
Service accounts	The service accounts to apply the policy to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	For Google Cloud only, this field is called Projects.
Tag Values Condition	
Tag Name	List of tag names that you can add by selecting **Add**.
Tag Value	List of tag values in a new line.
Approval type	The action to take on each resource that matches the policy. Business Hours operations are directly integrated with the ServiceNow Change Management feature. Auto-approval (Standard Change): ○ Generate a recommendation to apply the specified business hours and add the resource to the Business hours reports. ○ Generate and then auto-approve a change request for the change group. ○ Add the resource to the Business hours reports. ○ Apply the Business hours schedule to the resource. Manual approval (Normal Change): ○ Generate a recommendation to apply the specified business hours schedule and add the resource to the Business hours reports. ○ Generate a change request for members of the change group. ○ Add the resource to the Business hours reports. ○ Any member of the group with the sn_change_write role can approve the change request. ○ When approved, apply the Business hours schedule to the resource. Report-only: ○ Generate a recommendation to apply the specified business hours. ○ Add the resource to the Business hours reports.
Business hour schedule	The schedule that specifies the days of the week and times of day that the resource should be powered on.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Value
	Select a schedule from the list or define a schedule by navigating to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Business hours schedules**. For more information, see Create Business hours schedule.

5. Select **Submit**.

Result

- The created policy appears on the **Business Hours Policies** tab.
- When the Discovery and Billing Download job executions finish, the system applies active policies to identify matching resources and then performs the policy actions on the resources.

What to do next

After you create or update a policy, select **Apply policies** to apply the created policy to a resource. This action also notifies you if enough recent billing data for AWS, Azure, or Google doesn't exist to apply the policy.

Related topics

Business hours

Change Management

Standard change catalog

Create a change request template

Exclude a resource from all Cloud Cost Management reports

Reduce resource cost with Commitments

View the Reserved Instances (RI) report, implement recommendations, and configure processes to convert on-demand payment plans to reservation plans, and save the cost of your resources.

Refine your results for the Reserved Instances report using filters such as payment option, term, and look back period.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

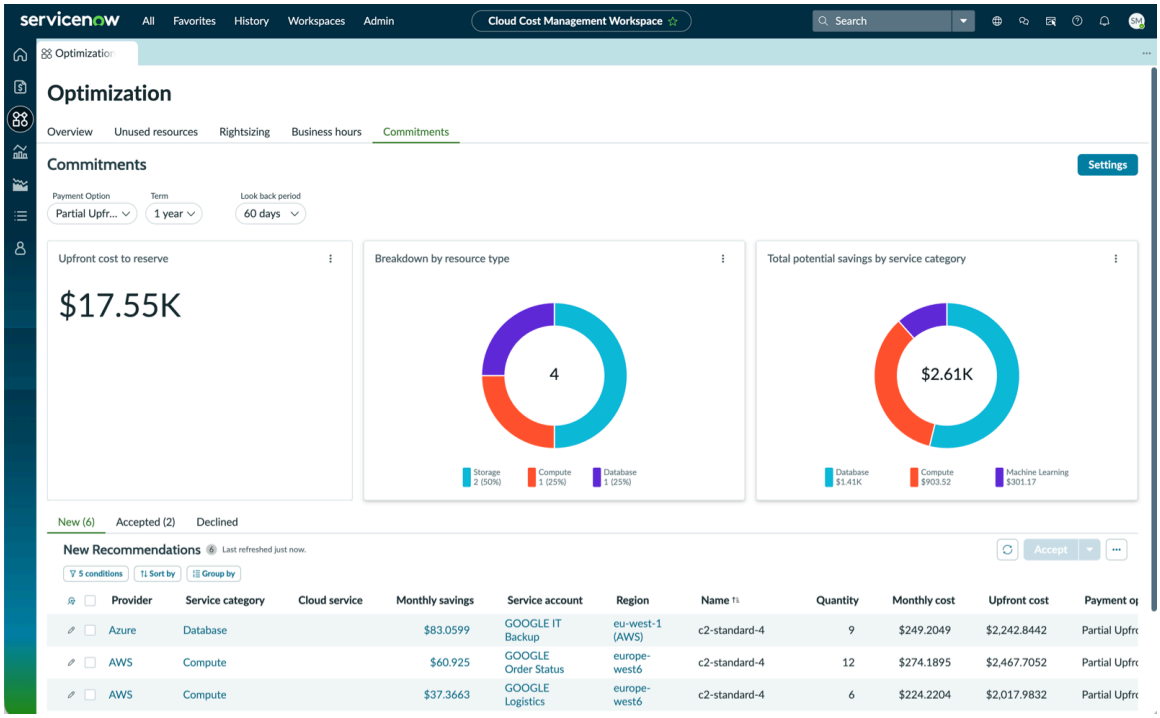


Chart	Description
Upfront cost to reserve	Upfront cost if all committed recommendations were applied.
Breakdown by resource type	Percentage of resources that were used and that weren't used in the last 30-day period.
Potential savings by service category	Monthly savings to expect when all committed recommendations are applied.

Recommendation tab	Description	Available selections on selected recommendations
New	Resources that would benefit most in commitments. Review the list and decide the conversion to commitments. You can convert by moving a resource to one of the other tabs by selecting the appropriate action.	• Accept • Decline
Accepted	Resources that are converted to commitments. After a resource is moved to the **Accepted** tab, it won't reappear on the **New** tab.	Decline
Declined	Resources that aren't converted to commitments. After a resource is moved to the **Declined** tab, it won't reappear on the **New** tab.	Accept

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: When you move a resource to the **Accepted** or **Declined** tab, the Cloud Cost Management application doesn't perform any action. You can change payment plans on the provider management interface.

Google Cloud recommendations are updated periodically and might not show the latest suggestions until the console is manually refreshed. In contrast, Cloud Cost Management fetches recommendations via API, ensuring it has the most current data. This difference can sometimes cause Google Cloud RI recommendations in Cloud Cost Management to diverge from what's shown in the Google Cloud console. A manual refresh is required to see the latest recommendations.

Configure Commitments operations by selecting **Settings**.

Configure Commitments operations

Configure Commitments processes and specify the amount of potential savings that triggers notifications.

Before you begin

Run Discovery on each service account.

Ensure that the Billing Download job has completed for each provider.

Role required: insights_admin and insights_owner

Procedure

1. Navigate to **Cloud Cost Management Workspace** > **Optimization** > **Commitments**.
2. On the Reserved Instances page, select **Settings**.
3. On the form, fill in the fields:

Reserved Instance Settings form

Field	Description
Enable Reserved Instance	Option for enabling Reserved Instance activities. Clearing the check box disables Commitments operations. Default: Enabled
Notify when potential reserved instance savings exceed (%) of total spends	Percentage of overall cloud spends for potential savings on reserved savings that should trigger an email notification to the users or groups that you specify. The value is calculated using the amount that could be saved if all the Commitments recommendations are followed. The default value of **15** means that notifications are sent only when the savings for potential reserved instances are greater than 15% of total costs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Do not recommend if savings are below threshold	Minimum cost, as calculated over the Lookback period, to use when deciding whether to recommend a Commitment for a resource. For example, a setting of ¥100 means that the app should ignore any Reservation/Saving plan recommendation that would result in less than ¥100 in savings.
Notify groups/Notify users	Users or groups to notify by email when the spend for potential reserved instance savings exceed the specified percentage of overall cloud spend. For information on configuring the email, see Create an email template.
Default Filter Settings	
Payment option	Sets the selected payment option as the default filter on the Commitments page.
Term	Sets the selected term as the default filter on the Commitments page.
Look back period	Sets the selected look back period as the default filter on the Commitments page.

4. Select **Save**.

What to do next

To view the changes, rerun the Billing Download job.

Manage cloud budgets

Define and monitor custom budget plans for managing your cloud spend by using the Budget view in the Cloud Cost Management Workspace.

Create or update a budget policy

Create budget policy to specify a budgeted amount, cost type, reset period, and other aspects of the budget. In addition, specify who can view budget data and who is notified of variances from the budgeted amount.

Before you begin

- A cloud account (parent account) that has at least one service account and associated datacenters is required.
- A Billing Download job must be defined.

> **Note:** For Microsoft Azure, you must first execute a Billing Download job before defining a budget plan.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner] for owned service accounts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

You must select one of the Cloud Cost Management application scopes to create or update a budget policy.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Budget**.
2. Select **Create budget**.
3. On the Budget policy creation form, fill in the fields.
   For a description of the field values, see List of Budget policy creation fields.
4. Select **Submit**.

Result

After you create or modify a budget policy, the policies get displayed on the **All Budgets** page in the Budgets view. Find the details of the budget such as overrun, surplus, or invalid budgets. You can view only the overrun budgets by toggling the **Show overrun budget only** toggle button. Search a budget by its name, owner, or provider.

Manage Cloud Cost Management subscriptions

Reduce your licensing costs by choosing only the Cloud Cost Management Resource Categories that you use.

Note: Starting with the Australia release, subscription in only past 30 days are counted as managed by the Cloud Cost Management application.

The Cloud Cost Management application uses Subscription Units to calculate the cost of resource categories that you use. A Subscription Unit is a unit of measure applied to Managed IT Resources using Defined Ratios. A Subscription Unit allows for a single unit price to be applied via ratios to different IT resource types to reflect varying customer value. Virtual Machines, databases, and storage volumes that are discovered as part of the billing download in the past 30 days are counted as managed by the Cloud Cost Management application.

For further information on managed IT resources and Subscription Unit ratios, see Subscription Unit Overview for Cloud Cost Management.

Managed IT Resource types

There are three IT Resource categories in ServiceNow Cloud Cost Management - Server, PaaS Resources, and IaaS Storage.

- Server is any physical or virtual server that is represented as a configuration item (CI) in the CMDB tables listed in the following license resource categories and managed by the Cloud Cost Management application. Server includes virtual machines in AWS, Azure, or GCP.
- PaaS Resources are cloud-based platform services that are represented as a CI in the CMDB tables listed in the following license resource categories and managed by the Cloud Cost Management application. PaaS resources include databases.
- IaaS Storage is any cloud-based infrastructure service represented as a CI in a CMDB table listed in the following license resource categories and managed by the Cloud Cost Management application. IaaS resources include storage volumes.

Cloud Cost Management License Resource Categories

Resource category	Subscription unit ratio	Model category
Server	1:1	cmdb_ci_vm_instance

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cloud Cost Management License Resource Categories (continued)

Resource category	Subscription unit ratio	Model category
		Any CMDB classes derived from the listed classes and not defined as another Managed IT Resource type.
PaaS resources	1:3	• cmdb_ci_database • cmdb_ci_cloud_database Any child classes of the listed classes.
IaaS storage	1:3	cmdb_ci_storage_volume Any child classes of the listed class.

An example for calculating license resource consumption:

Suppose your organization manages 2 servers, 3 databases or PaaS resources, and 3 storage volumes or IaaS resources.

The total number of license resource units consumed is: (2 + 1 + 1) = 4 resource units.

To calculate cost, multiply each resource count by the applicable per-unit rate from your entitlement. For example, at a rate of n per resource unit: (2*n) + (1*n) + (1*n) = 4n.

View the license report for the Cloud Cost Management application

View details of the subscriptions purchased and consumed by your organization for the managed IT resource types such as Server, End User Computing Device, and Database using the ITAM License Report.

Before you begin

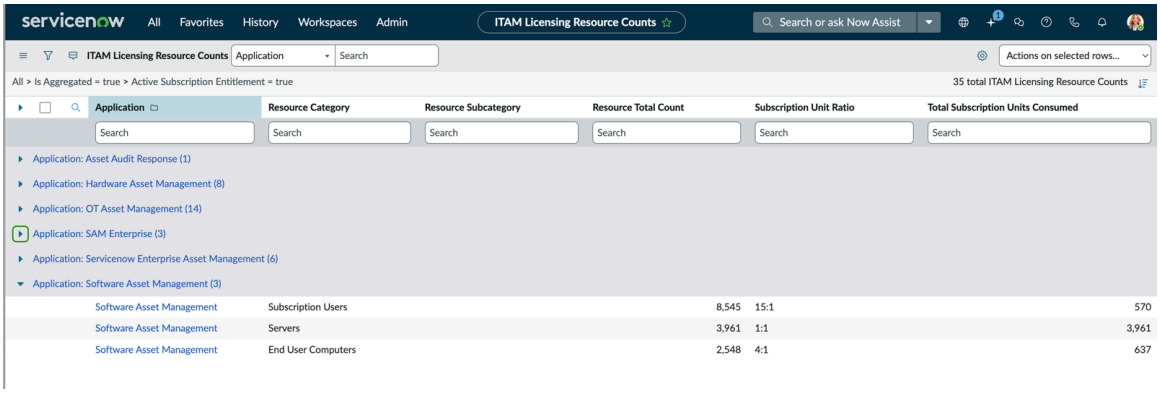
Role required: admin, usage_admin

Procedure

1. Navigate to **All** > **ITAM Licensing** > **ITAM License Report**.
2. Select the Software Asset Management application to view the subscription for Cloud Cost Management.

   Subscription details of all the Cloud Cost Management applications activated on your ServiceNow instance are shown.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



You can view the following information on subscriptions purchased for the resource categories that you opted-in for the Cloud Cost Management application:

- **Application**: Name of the application that is activated on your ServiceNow instance. The ITAM License Report is grouped by the application.
- **Resource Category**: Managed IT resource types available for the Cloud Cost Management application. The resource types include the following:
  - Server
  - Virtual machines
  - Databases
  - Storage volumes
- **Resource Total Count**: Asset count of the managed IT resources that is grouped by Resource categories and Model categories.

  The Cloud License Estimator enables you to determine the estimated resource count for all the cloud resources that are eligible for licensing based on Cloud Cost Management licensing rules. For more information, see Cloud License Estimator.
- **Subscription Unit Ratio**: Predefined ratios that determine how many assets of a Resource category require a subscription. For example, the defined ratio of 1:1 for Server means that every asset of that resource category requires one Subscription Unit.
- **Total Subscription Units Consumed**: The number of subscriptions per Resource category that your organization consumed. The licensing module calculates this number by applying the Subscription Unit Ratio to the Resource Total Count for each Resource Category.

Assign service accounts to an insights_owner

Assign ownership of one or more service accounts and, optionally, the related CIs to users that have the insights_owner role. An insights_owner can define jobs and policies and can view data for owned service accounts.

Before you begin

Before you assign service accounts, you might want to view the list of current insights_owner and their owned accounts. For more information, see View the service accounts owned by an insights_owner.

Role required: insights_admin [sn_clin_core.insights_admin]

About this task

The insights_owner role spreads responsibility for Cloud Cost Management activities to persons who have good knowledge of operations in the service accounts. For more information about the insights_owner role, see Cloud Cost Management roles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

A service account is a secure record on your instance that holds the credential and access information for your provider account. Discovery uses the information to access your provider account to get data on each resource in each specified datacenter.

Tip: When you assign service accounts to a user, the user is auto-granted the insights_owner role.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Account to owner mappings**.
2. Select **Assign accounts that currently have no owner**.
3. On the form, fill in the fields.

Set up or update ownership of service accounts

Field	Description
Insights Owner	User to whom the service account has to be assigned.
Service accounts	Service accounts to be assigned to the insight_owner.
Change template	Change template to use to create the change request for this task. The system uses a Standard Change to alert the insights_owner of the change for the task to be auto-approved. If no change request template appears in the list, navigate to **Service Catalog** > **Standard Changes** to create a template.

4. Specify how to populate the **Owner** field for CIs in service accounts.

Option	Description
Assign insights_owners only to CIs with no owner	For newly created CIs and for CIs in the ser vice accounts that have no value for the *Owner* property, assign the new insights_ owner. **Note:** A daily scheduled job sets the **Owner** field of each newly discovered CI to the Owner setting for the associat ed service account.
Assign insights_owners to all CIs	For the *Owner* property of every CI in the specified service accounts, assign the new in sights_owner.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
	Note: A daily scheduled job sets the **Owner** field of each newly discovered CI to the Owner setting for the associated service account.
Do not update any CIs	Make no changes to CIs in the specified service accounts.

- The affected service accounts are removed from policies that were created with the insights_owner role. The affected service accounts aren't removed from policies that were created with the insights_admin role.
- The new insights_owner must create and manage new policies for the affected service accounts.
- The new account owner takes ownership of Rightsizing and Unused Machines jobs that include resources from all transferred service accounts.

5. **Optional:** Add any additional details to your request such as delivery address and special instructions.
6. Select **Submit**.

Update or reassign insights_owner privileges

Assign ownership of one or more service accounts and, optionally, the related CIs to users that have the insights_owner role. An insights_owner can define jobs and policies and can view data for owned service accounts.

Before you begin

Before you assign service accounts, you might want to view the list of current insights_owner and their owned accounts. See View the service accounts owned by an insights_owner for details.

Role required: insights_admin [sn_clin_core.insights_admin]

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Account to owner mappings**.
2. Select **Change the owner for one or more accounts**.
3. On the form, fill in the fields.

Set up or update ownership of service accounts

Field	Description
Original Insights Owner	Owner to transfer the ownership of service accounts from.
New Insights Owner	User to transfer the ownership of service accounts to.
Service accounts	Service accounts to be assigned to the insights_owner.
Change template	Change template to use to create the change request for this task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	The system uses a Standard Change to alert the insights_owner of the change for the task to be auto-approved. If no change request template appears in the list, navigate to **Service Catalog** > **Standard Changes** to create a template.

4. Specify how to populate the **Owner** field for CIs in service accounts.

Option	Description
Assign insights_owners only to CIs with no owner	For newly created CIs and for CIs in the ser vice accounts that have no value for the *Owner* property, assign the new insights_ owner. **Note:** A daily scheduled job sets the **Owner** field of each newly discovered CI to the Owner setting for the associat ed service account.
Assign insights_owners to all CIs	For the *Owner* property of every CI in the specified service accounts, assign the new in sights_owner. **Note:** A daily scheduled job sets the **Owner** field of each newly discovered CI to the Owner setting for the associat ed service account.
Do not update any CIs	Make no changes to CIs in the specified ser vice accounts.

   - The affected service accounts are removed from policies that were created with the insights_owner role. The affected service accounts aren't removed from policies that were created with the insights_admin role.
   - The new insights_owner must create and manage new policies for the affected service accounts.
   - The new account owner takes ownership of Rightsizing and Unused Machines jobs that include resources from all transferred service accounts.

5. **Optional:** Specify whether to transfer policies to the new owner.
   This setting applies when the selected service accounts are currently owned by a different insights_owner. Transferring the policies enables the new insights_owner to own (view, update, or delete) policies that are associated with the specified service accounts.

   Important: Policies owned by users with the insights_admin role aren't changed in any way.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
Yes	The following process runs: **a.** The instance clones all affected policies that are owned by Insights Owners. **b.** The instance removes appropriate service accounts from each affected policy and moves the accounts to the new clone poli cy. Each clone policy contains only the af fected service accounts. ▪ If service accounts remain in the original policy, then the original owner retains ownership of the original policy. ▪ If an original policy has no service ac counts after all affected accounts are removed, then the clone isn't used. In stead, the new insights_owner becomes the owner of the original policy. **c.** The instance assigns ownership of the new policies to the new insights_owner. **d.** The instance sends email notifications to both the original and new owners.
No	○ The instance removes the affected ser vice accounts from all policies owned by Insights Owners. If no service accounts re main in a policy, then the policy is set to the Invalid state. ○ The new insights_owner must create and manage the new policies for the affected service accounts.

6. Select **Submit**.

View the service accounts owned by an insights_owner

View the list of users that have the insights_owner role and the service accounts that each owner owns.

Before you begin

Role required: sn_clin_core.insights_admin or sn_clin_core.insights_owner

About this task

A service account is a secure record on your instance that holds the credential and access information for your provider account. Discovery uses the information to access your provider account to get data on each resource in each specified datacenter.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **View insights owners**.
2. Select the name of any user to view the details of the owned service accounts.

Exclude a resource from all Cloud Cost Management reports

To ensure that cost data for a particular resource doesn't appear in a report, you exclude the resource by adding it to the Excluded Resources list.

Before you begin

A cloud account (parent account) that has at least one service account and related datacenters is required.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner] for owned service accounts.

About this task

- Excluding a resource from a report means that the resource doesn't get displayed in the report. This setting doesn't affect analysis of data for the resource.
- At any time, you can remove a resource from the Excluded Resources list.
- An insights_owner can exclude resources and remove a resource from the Excluded Resources list only in owned service accounts.
- Production resources are examples of resources that you might exclude. Because production resources must always be active, you might, for example, want to exclude production resources from Business Hours reports.
- You can exclude a resource either from a single report type or from all reports. You can select a resource and select **Exclude** for excluding the resource from the current report. The resource you exclude gets added to the **Excluded Resources** list for the report.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Administration** > **Global exclusions**.
2. Select **New**.
3. On the form, fill in the fields.

Excluded Resources

Field	Value
Resource	The resource to exclude. Only virtual machine resources appear in the list.
Description	The reason for excluding the resource.

4. Select **Save**.

Result

The resource is excluded from all reports. After you submit the record, you can open it to update the reports from which to exclude the resource.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Remove a resource from the Excluded Resources list

You can remove a resource from the Excluded Resources list.

Before you begin
Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner] for owned service accounts.

About this task
When you remove a resource from the Excluded Resources list, the resource appears in the appropriate reports.

Procedure
1. Navigate to **Cloud Cost Management** > **Operations** > **Administration** > **Global exclusions**.
2. Select the resources to remove.
3. In the Actions on selected rows list, select **Delete**.

Create and update a tag category

Create a tag category to enable multiple tag names for representing costs against a single business entity. For example, multiple users might independently have created the tag names "App", "AppService", and "appl" to indicate applications. With a tag category of "Application", any costs for items tagged App, AppService, or appl are correctly assigned as costs against an application.

Watch this short video to learn how to create and update a tag category.

https://player.vimeo.com/video/1136169557?h=447f9cfac5&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: insights_admin [sn_clin_core.insights_admin]

About this task
This procedure describes the process as performed from the user interface. Alternatively, to speed the process, you can edit the affected tables directly.

- Tag Category [sn_cld_intg_core_tag_category]
- Tag Name-Category [sn_cld_intg_core_tag_name_category]

Note: Each successful execution of a Billing Download job updates tagged costs. Recent updates that you make to tag category definitions might not reflect ton the cost reports. To apply the latest tag category definitions to cost data without running a Billing Download job, select **Reapply categories** by navigating to **Cloud Cost Management Workspace** > **Operations** > **Cost usage tags** > **Tag categories**.

Procedure
1. Navigate to **Cloud Cost Management Workspace** > **Operations** > **Cost usage tags** > **Tag categories**.
2. On the Tag Categories list, select **New**.
   For the list of default tag categories, see List of default tag categories.

   Note: In this step, you add a single tag name to the category to create the initial category record. You can add any number of tag names to the category later.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the form, fill in the fields.

Tag Category form

Field	Description
Name	A unique and meaningful name for the category.
Active	The option to add the category to the **Tag Category** filter list on spend reports.
Enable grouping	Option to add a *category:value* option for this category to the list of **Group by** choices on spend reports. **Note:** A category must be active to appear in the **Group by** list.
Tag names	The list of tag names that you can add to the category. **a.** Select the Lookup icon to open the list of tag names that came with the latest Billing Download Job. All tag names appear on the Tag Names list. **b.** Select tag names from the drop-down list.

4. Select **Save** to create the category.
   The new category appears in the Tag Categories list.
5. In the Tag Categories list, select the category that you just added.
   The Tag Category form reopens and the tag name that you added appears in the **Tag names** list.
6. **Optional:** On the **Tag names** list, select the Lookup icon to add multiple tag names.

Related topics

Cost usage tags

Select a tag category source

Select a tag category source to control how the Cloud Cost Management application maps cloud resource tags to business entities for cost attribution and reporting.

Before you begin

Role required: insights_admin [sn_clin_core.insights_admin]

About this task

The tag category source determines how spend tags are derived during billing downloads. Selecting the tag category source also determines how costs are grouped in analytics, forecasting, and recommendations.

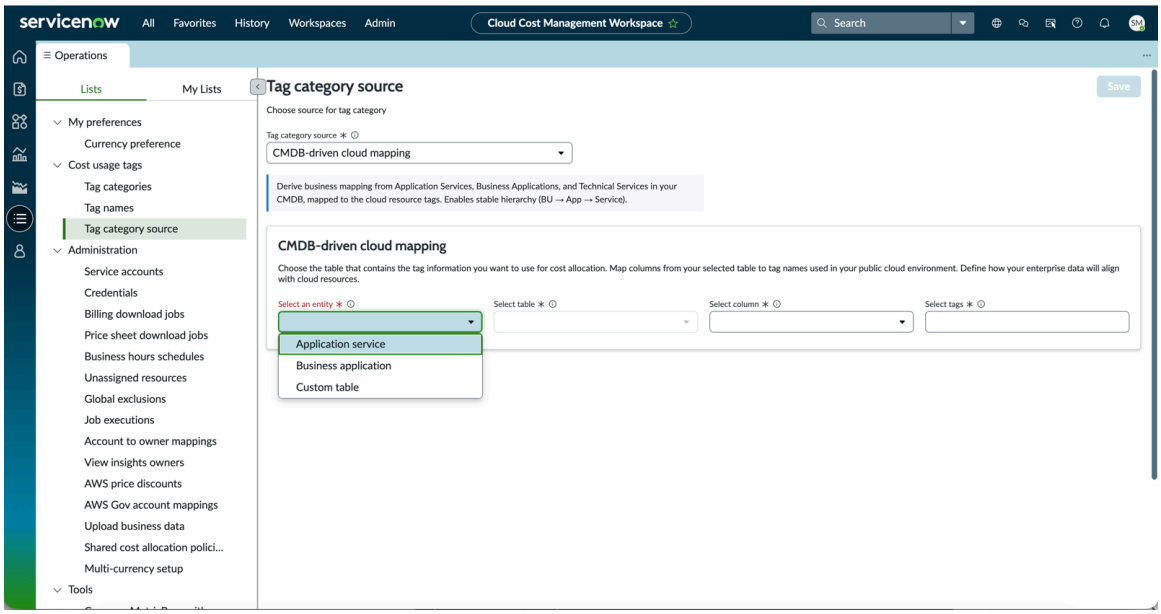
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Cost usage tags** > **Tag category source**.
2. In the **Tag source category** field, select the tag category source that matches your environment.

Tag category source	Description
Cloud provider tags	Uses native cloud provider resource tags that are defined and managed in the Cloud Cost Management application.
CMDB-driven cloud mapping	Maps billing data to CMDB CI entities for cost attribution. You must take the following ac tions after you select **CMDB-driven cloud mapping**. ○ **Select an entity**: Maps billing line items to an entity. Options include: ▪ **Application service**: Maps billing line items to application services using a tag name present on cloud resources. ▪ **Business application**: Maps billing line items to business applications. The table is auto-selected. ▪ **Custom table**: Select when your organiza tion uses a child table of **Application ser vice** with a custom column for tag values. You select the table and column manual ly. ○ **Select table**: The CMDB CI table that con tains the entity values. These values are auto-selected for **Application service** and **Business application**. For **Custom table**, se lect the child table of **Application service** that your organization uses. ○ **Select column**: The column in the selected table whose values correspond to the tag values on billing line items. ○ **Select tags**: The tag name to look for in each billing line item. When this tag name is found, the Cloud Cost Management applica tion looks up the matching entity in the se lected table and column and associates it with the spend record.
ServiceNow-managed dimensions	Uses ServiceNow-managed dimension tags for cost attribution. You must verify that CI-to-application service relationships are populated in your CMDB be fore you select this option.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



3. Select **Save**.

   The Cloud Cost Management application saves the tag category source and triggers a billing data repopulation. All billing data is reprocessed to reflect the updated taxonomy.

Related topics

Cost usage tags

Create and update a tag category

Add or update a tag value for an AI Service tag category

Associate a tag name with its corresponding tag value whenever a new AI service or a category within an existing AI service is introduced for Amazon Web Services (AWS), Microsoft Azure, or Google Cloud Platform (GCP).

Before you begin

Role required: insights_admin [sn_clin_core.insights_admin]

About this task

Important: This feature is available with the Cloud Cost Management 8.0.0 version or later.

Procedure

1. Navigate to **Cloud Cost Management Workspace** > **Operations** > **Cost usage tags**.
2. Select **Tag categories**.
3. On the Tag categories page, select the **AI Service** tag category.
4. On the AI Service page, select the **Tag name value** tab.
5. Select **Add/Update tag values**.
6. In the **Add/Update AI Service tag values** dialog box, select the **Create** tab.
7. Select the service provider tag name and provide a tag value.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For AWS, add the lineItem/ProductCode as the tag value against the AWS AI service tag name **sn_ccm_aws_ai_service**.
- For Azure, add the Meter Category name as the tag value against the Azure AI service tag name **sn_ccm_azure_ai_service**.
- For GCP, add the Service description name as the tag value against the GCP AI service tag name **sn_ccm_gcp_ai_service**.

8. Select **Submit**.
9. **Optional:** If you want to update the tag value of an AI service that you have created, select **Add/update tag values**.

   Note: You can't update the tag values for the default cloud categories for managing AI services. To view the default cloud categories for managing AI services within the Machine Learning service category, see List of default Cloud categories for AI services.

   a. Select the **Update** tab.

   b. Select the provider tag name.
   For example, select **sn_ccm_aws_ai_service**.

   c. Select the tag value that you want to update.
   For example, select **Amazon Test**.

   d. Provide a new tag value for it.
   For example, change the existing tag value to **Amazon Test 2**.

   e. Select **Submit**.

Result

After a tag name is associated with its corresponding tag value, you can view the spend data of the AI service you added on the Spend analytics page. For more information, see Spend analytics.

What to do next

After you add a tag value for an AI Service tag category, you must reimport the billing data to generate the spend for the added tag.

Related topics

Cost usage tags

Create and update a tag category

Schedule and manage the jobs that download AWS billing data

Schedule and manage the jobs that download Azure billing data

Schedule and manage the jobs that download Google Cloud billing data

Upload business data for unit economics

Upload revenue and unit count data to populate the Unit economics dashboard in the Business Insights view. This Unit economics dashboard enables you to view unit count data across applications, departments, and business units.

Before you begin

Role required: insights_admin [sn_clin_core.insights_admin]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

The Unit economics dashboard requires revenue and unit count data that you provide through file upload. The Cloud Cost Management application combines this data with cloud and non-cloud costs already in the system to calculate cost per unit, margin, and margin percentage for each business application. Download the template, complete it with your data, and import it to populate the Unit economics view.

Note: You can upload one file at a time. Each uploaded file creates a separate upload history record.

Procedure

1. Navigate to *Cloud Cost Management Workspace* > **Operations** > **Upload business data**.
2. Select **New**.
3. Upload a business data file.
   - If you have an existing Excel or CSV file, select **Add file** and choose a file from your device.

     Important: You must follow the template's column structure when uploading files; deviations will cause an error.

   - If you don't have an existing, select **Download template** to get the template.

   The following template contains the required column structure for your business data.

Business data upload template fields

Field	Description
Monthly unit metric	The unit type used to measure consumption for this business application. For example, API calls and number of customers. This value appears as the unit label in the Unit economics view.
Currency code	The currency code for the revenue value in this row. For example, USD or EUR.
Monthly revenue	The total revenue for this business application in the specified month. This value is used to calculate margin and margin percentage.
Business application	The name of the business application. The value must match a business application defined in yourCMDB.
Units	The total number of units consumed for this business application in the specified month. The total cost is divided by this value to calculate cost per unit.
Date	The month for which the data applies. Enter the date in the required format.

4. Complete the template with your business data and save the file.
5. On the New business data upload page, select **Import**.
   You must import one file at a time.

   The Cloud Cost Management application processes the file and creates an upload history record. The upload history record shows the number of validated rows, error rows, and excluded rows.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. **Optional:** Review and resolve upload errors by selecting the upload history record.

   a. Select **Review import errors**.

   b. Review the rows listed under the **Errors** column to identify validation issues.

   c. For each error row, do one of the following:

      - **Mark as reviewed**: Edit the value in the error row inline and resubmit. If the value passes validation, the row moves to the **Validated data** tab.
      - **Exclude**: Removes the row from processing. The upload status updates to **Completed** when no error rows remain.

Result

Validated rows are written to the unit economics table and appear in the Unit economics dashboard in the Business insights view.

Related topics

Business Insights view

Create or update a shared cost allocation policy

Create a shared cost allocation policy with#different allocation types to split the cost of shared cloud resources among various business lines.

Before you begin

- A cloud account (parent account) that has at least one service account and associated datacenters is required.
- A Billing Download job must be created and the billing data must be pulled.
- For Kubernetes, you must enable the cost allocation tag on your provider console for each Kubernetes cluster before you execute the Billing Download job.

Role required: insights_admin [sn_clin_core.insights_admin] or insights_owner [sn_clin_core.insights_owner] for owned service accounts.

About this task

- You must select one of the Cloud Cost Management application scopes to create or update a shared cost allocation policy.
- You can create as many policies as needed.
- If Kubernetes Service is selected as Service Category, you can't edit the Service Category, Resource Type, Kubernetes Cluster fields while editing a policy.
- When you deactivate a shared cost allocation policy, allocations get updated with the latest policy match.

Procedure

1. Navigate to **Workspaces** > **Cloud Cost Management Workspace** > **Operations** > **Administration**.
2. Select **Shared cost allocation policies**.
3. Select **New/Edit**.
4. On the Shared Cost Allocation Policy Creation form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For a description of the field values, see List of Shared cost allocation policy fields.

5. Select **Submit**.

Result

After you create or modify a shared cost allocation policy, the policy gets displayed on the **Shared Cost Allocation Policies** page. Find the details of the policy such as the name, allocation type, business unit, and cloud service.

When the Discovery and Billing Download job executions finish, the system applies active policies to identify matching resources and then performs the policy actions on the resources.

What to do next

After you create or update a shared cost allocation policy, select **Reapply policies** to apply the created policy to a resource.

Set up or update preferred currency options

Set up or update the preferred currency options for your cloud cost and usage data to gain reporting flexibility. These currency options become available for Cloud Cost Management users to choose from.

Before you begin

Role required: insights_admin

About this task

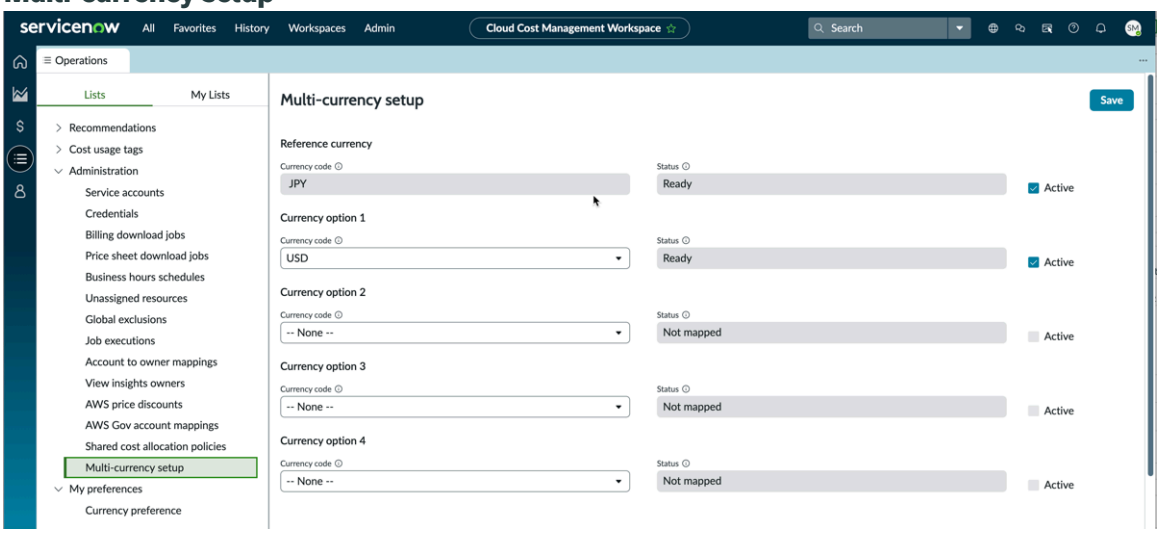
Setting up currency options enables Cloud Cost Management users to choose from the list of available currencies. Costs are calculated using the exchange rates specified by cloud service providers. These exchange rates are automatically applied to ensure cost reporting accuracy across regions.

Note: If you haven't set up the preferred currency options earlier, all the billing and usage data is displayed in the default currency.

Procedure

1. Navigate to **Workspaces** > **Cloud Cost Management Workspace** > **Operations** > **Administration** > **Multi-currency setup**.
2. Select a currency code from the **Currency Option 1** drop-down list

Multi-currency setup



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select the **Active** check box for **Currency Option 1** to activate the currency.
   The **Status** field is currently set to **Not mapped**.
4. Select **Save**.
   The **Status** field changes to **Awaiting processing**. After the processing starts, the **Status** field changes to **In progress** and a message is displayed on the screen that shows the progress in percent. The **Save** button remains unavailable until the status changes to **Ready**.
5. Repeat step 2, 3, and 4 to select additional currency options and activate them.
   At any given time, you can see a total of five active currencies that includes one reference currency plus four additional currencies.

Result

After the **Status** field changes to Ready, the selected currencies become available for selection in the **Currency preference** list on the Operations view.

Choose preferred currency for cost and usage data

Choose your preferred currency from the available options that will be shown for all the billing and usage data. The currency that you choose becomes the display currency on all the dashboard widgets, recommendations (rightsizing, business hours, unused resources, reservation/savings plan), budgets, and billing data.

Before you begin

Role required: insights_admin, insights_owner or insights_user

Procedure

1. Navigate to **Cloud Cost Management Workspace** > **Operations** > **My preferences** > **Currency preference**.
2. Select your preferred display currency from the **Currency display preference** drop-down list.
   The list shows only those currencies that were previously set up and activated in the Multi-currency setup by the insights_admin.
3. Select **Save**.

Result

The preferred currency is shown as the display currency in all dashboard widgets, recommendations, budgets, and billing data of the Cloud Cost Management Workspace.

Compare MetricBase data with spend data

Compare MetricBase (Clotho) data with your Spend data for Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP) to diagnose and troubleshoot Cloud Cost Management billing issues.

Before you begin

Role required: Cloud Insights Admin [sn_clin_core.insights_admin]

Request the MetricBase [com.snc.clotho] plugin. For more information, see Requesting the MetricBase product.

Verify that the Billing Download job has been completed successfully for the cloud provider.

About this task

Important: This feature is available with the Cloud Cost Management 8.0.0 version or later.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Cloud Cost Management Workspace** > **Operations** > **Tools**.
2. Select **Compare MetricBase with spend data**.
3. On the form, fill in the fields.

Compare MetricBase with spend data form

Field	Description
Provider	Cloud provider for which you want to compare MetricBase (Clotho) data with your Spend data. ○ AWS ○ Azure ○ GCP
Cost type	Contractual payment agreement with the provider. ○ Actual: Each billing period, your organization pays for direct cloud services. ○ Amortized: Your organization pays the effective cost of the upfront and monthly reservation fees spread across the billing period. The amortized cost type is described in detail on the provider's site.
Billing month	Months for which billing data is available based on the provider you select. This field is populated only with those months for which billing data is available.

4. Select **Submit**.

Result

A request with a unique number gets created and a CSV file is attached to the request item, which lists the comparison data. The process to generate the CSV file runs in the background and the file is attached to the request item when the processing is complete.

If there are any errors, the **Work notes** field of this request item is updated and Cloud Cost Management doesn't generate the CSV file.

What to do next

Select the **Requested Items** tab and then select the Requested Items number to navigate to the CSV file. In the Attachments section, you can find the CSV file. Download this file to analyze any mismatch in the cost values from both of the sources. You can also filter the data according to your requirements.

Cloud Cost Management reference

Reference topics provide additional information about the lists and forms that you use to configure and administer Cloud Cost Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Domain separation and Cloud Cost Management

Domain separation is unsupported for Cloud Cost Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

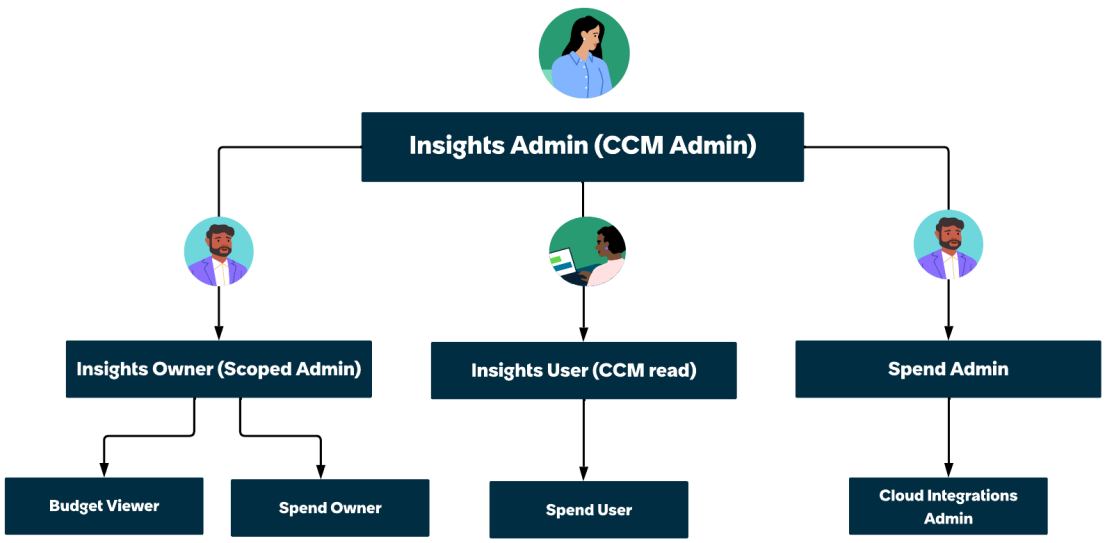
Related topics

Domain separation for service providers

Cloud Cost Management roles

Roles are installed with the activation of the Cloud Cost Management application.

Role relationships in Cloud Cost Management



Note: Starting with Cloud Cost Management 10.1.0, the discovery_admin role has been removed from the insights_admin, spend_admin, and cloud_integrations_admin roles. As a result, the following roles that are inherited through discovery_admin are also no longer included:

- credential_admin
- sn_capi.cloud_developer

Primary roles

Role title [name]	Permissions	Contains roles
Insights Admin [sn_clin_core.insights_admin]	The role is in the Cloud Cost Management Core plugin. You typically assign the role to the person who is financially responsible.	• insights_owner • spend_admin • insights_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Primary roles (continued)

Role title [name]	Permissions	Contains roles
	• View service accounts and all the related information. • Define Business hours and Unassigned resources policies. • Define and view Budget plans. • View spend optimization reports. • Add report extensions. • Perform the required actions in the Cloud Cost Management application.	• cloud_integrations_admin • budget_viewer • spend_owner • spend_user
Insights Owner [sn_clin_core.insights_owner]	The role is in the Cloud Cost Management Core plugin. The role spans only the Cloud Cost Management application. • Define jobs and policies. • View data for owned service accounts. For more information, see Assign service accounts to an insights_owner.	insights_user
Insights User [sn_clin_core.insights_user]	The role is in the Cloud Cost Management Core plugin. The role spans only the Cloud Cost Management application. View the Cloud Cost Management Workspace home page.	— none —
Spend Admin [sn_clin_core.spend_owner]	The role is in the Cloud Cost Management Core plugin. The role spans only the Cloud Cost Management application. Access the spend data for owned service accounts in the Cloud Cost Management application.	cloud_integrations_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Secondary roles

Role title [name]	Permissions
Cloud Integrations Admin [sn_cld_intg_core.cloud_integrations_admin]	The role is in the Cloud Integrations Core plugin. Configure Billing Download jobs and Price Sheet Download jobs.
Spend Owner [sn_clin_core.spend_owner]	The role is in the Cloud Integrations Core plugin. Access all the spend data for owned service accounts in the Cloud Cost Management application.
Budget Viewer [sn_clin_core.budget_viewer]	The role is in the Cloud Cost Management Core plugin. The role spans only the Cloud Cost Management application. View Budget Forecast reports and policies.
Spend User [sn_cld_spend_core.spend_user]	The role is in the Cloud Cost Management Core plugin. Access Spend dashboards and tables.

Related topics

Assign a role to a group

Assign a role to a user

Components installed with Cloud Cost Management

Several types of components are installed with activation of the Cloud Cost Management application, including tables, user roles, and scheduled jobs.

Scheduled jobs installed

Scheduled job	Description
Price Sheet Table Cleaner	Cleans up AWS price sheet records.
Resource Group Table Cleaner	Cleans up Azure resource group records that are no longer required.
CCM CleanUp Inactive Aggregated Spend Records	Cleans up inactive aggregated spend records.
Cloud Insights Historical Data Collection	Collects GCP spend data.
Cloud Insights Saving Daily Data Collection	Collects potential savings and realized savings for spend.
Cloud Insights Spend Saving Data Collection	Collects cloud spend potential saving percentage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scheduled job	Description
Execute Tasks	Executes tasks associated with AWS billing download.
Flow Launcher and Hierarchical Flow Launcher Keep Alive	Cancels stale flow jobs.
GCP Price Sheet Table Cleaner	Cleans up GCP Price sheet table
Tag Categories Based Recommendation	Generates Tag Category based recommendations.

Important: The following scheduled jobs are used only when the Cloud Cost Management Infra Stack application is installed in addition to Cloud Cost Management version 8.1.

Cumulus- Cancel stuck job	Monitors scheduled billing jobs and cancels the jobs that are stuck. This enables billing jobs in the queue to be processed.
Unsupported CI Type Placement	Places the CI types that aren't used for daily recommendations.
CCM - Daily job	Performs daily maintenance activities such as cleanup of left-out attachments of AWS billing job (with assume role authentication).

Tables installed

Table	Description
CI Placement Extension Progress Calculation [sn_cld_intg_aws_ci_placement_extension_progress_calculation]	Configuration Items placement progress for AWS. Contains number of records to be processed by the AWS extension.
CI Placement Stats [sn_cld_intg_aws_ci_placement_stats]	Status of bookmarks created during the Configuration Items placement for AWS.
AWS CI Placement Type Information [sn_cld_intg_aws_ci_placement_type]	All types of Configuration Items deployed byCloud Cost Management for AWS.
AWS Cost And Usage Bill Data [sn_cld_intg_aws_cost_usage]	Cost and billing data for AWS.
Cost Usage Bookmarks [sn_cld_intg_aws_cost_usage_bookmarks]	Time stamp bookmarks created for the ingested Cloud Cost Management placement records.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
CloudWatch Metric Association [sn_cld_intg_aws_cw_metric_association]	Custom metrics created by user.
AWS CloudWatch Metric Definition [sn_cld_intg_aws_cw_metric_definition]	Definitions for various AWS cloud watch metrics.
CloudWatch Metric Definition to Account [sn_cld_intg_aws_cw_metric_definition_account_m2m]	Metric to service account mapping information.
AWS Baseline Performance for EC2 Burstable Instances [sn_cld_intg_aws_ec2_burstable_baseline_perf]	Baseline performance percentage for AWS EC2 burstable instances.
AWS Gov Accounts Mapping [sn_cld_intg_aws_gov_account_mapping]	AWS Gov accounts and linked accounts details.
AWS Instance details [sn_cld_intg_aws_instance_detail]	Details for various AWS instances present.
AWS Instance Price details [sn_cld_intg_aws_instance_price_detail]	Pricing and rate details for AWS instances.
AWS Offer Term [sn_cld_intg_aws_offer_term]	Offer term details based on configurations of AWS products.
AWS Price Discount [sn_cld_intg_aws_price_discount]	Price discounts for AWS service accounts.
AWS Price Sheet Information [sn_cld_intg_aws_price_sheet_info]	Price sheet details for AWS.
AWS Product Details Base [sn_cld_intg_aws_product_details]	All product details or specifications for AWS.
AWS Product Details EC2 [sn_cld_intg_aws_product_details_ec2]	EC2 product details or specifications for AWS.
AWS Product Details RDS [sn_cld_intg_aws_product_details_rds]	RDS product details or specifications for AWS.
AWS Resource Hourly Usage Last Downloaded [sn_cld_intg_aws_resource_hourly_usage_last_downloaded]	Hourly usage download status for AWS resources.
AWS Resource Rate [sn_cld_intg_aws_resource_rate]	Resource rates for AWS product SKUs.
AWS Billing Download Job [sn_cld_intg_aws_schedule]	Billing download jobs and their status for AWS.
AWS Storage Price Details [sn_cld_intg_aws_storage_price_detail]	Storage price sheet information for AWS.
Azure CI Placement Type Information [sn_cld_intg_azure_ci_placement_type]	Defines all types of Configuration Items deployed by Cloud Cost Management for Azure.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Azure Cost And Usage Bill Data [sn_cld_intg_azure_cost_usage]	Cost and billing data for Azure.
Azure Database Price Sheet [sn_cld_intg_azure_db_price_sheet]	Price sheet details for Azure database.
Azure Database retail price detail [sn_cld_intg_azure_db_retail_price]	Retail price information for Azure database.
Azure Enrollment To Service Account Mapping [sn_cld_intg_azure_ea_sa_mapping]	Mapping information for enrollment account to the service accounts used by Cloud Cost Management.
Azure Instance Details [sn_cld_intg_azure_instance_detail]	Details of various Azure instances present.
Azure Instance Price Details [sn_cld_intg_azure_instance_price_detail]	Pricing and rate details for Azure instances.
Azure Instance Series To Family Mapping [sn_cld_intg_azure_instance_series_family_mapping]	Instance family to instance series mapping information for Azure.
Azure Instance Size Details [sn_cld_intg_azure_instance_size_detail]	Details about various Azure instances sizes & their functionalities.
Azure Normalized Region [sn_cld_intg_azure_normalized_region]	Resource location to a generic normalized location mapping information.
Azure Price Sheet Version [sn_cld_intg_azure_price_sheet_version]	Price sheet status and version for Azure.
Azure Product Details [sn_cld_intg_azure_product_details]	All product details or specifications for Azure.
Azure Product Details VM [sn_cld_intg_azure_product_details_vm]	Virtual Machine product details or specifications for Azure.
Azure Product Offering VM [sn_cld_intg_azure_product_offering_vm]	Offer term details for Azure Virtual Machine service.
Azure Product Details Instance Type Map [sn_cld_intg_azure_prod_dtls_inst_type_map]	Product details for various instance types for Azure.
Azure Advisor Subscription Queue [sn_cld_intg_azure_recommendation_subscription_queue]	Stores the states of generate, get generate status and list recommendations flow launcher jobs, for provider based recommendations of Azure.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Azure resource hourly usage last downloaded [sn_cld_intg_azure_resource_hourly_usage_last_downloaded]	Hourly usage download status for Azure resources.
Azure Resource Rate [sn_cld_intg_azure_resource_rate]	Resource rates for Azure meter IDs.
Azure Billing Download Job [sn_cld_intg_azure_schedule]	Billing download jobs and their status for Azure.
Azure Software Cost Details [n_cld_intg_azure_software_cost_detail]	Hourly cost details for Azure software.
Azure Storage Price Details [sn_cld_intg_azure_storage_price_detail]	Storage price sheet information for Azure.
Azure Storage Size Details [sn_cld_intg_azure_storage_size_detail]	Various Azure storage sizes & their functionalities.
Cloud Action Execution [sn_cld_intg_core_action_exec]	Execution details for various cloud actions.
Cloud Alias [sn_cld_intg_core_alias]	List of defined aliases.
Cloud Alias Mapping [sn_cld_intg_core_alias_mapping]	Alias mapping to the script or action flow.
Cloud API Request [sn_cld_intg_core_api_request]	API request & parameters sent to the provider.
Cloud API Request Error [sn_cld_intg_core_api_request_error]	Error responses for failed request items.
Cloud API Request Item [sn_cld_intg_core_api_request_item]	API request item details sent to the provider.
Cloud API Response [sn_cld_intg_core_api_response]	API responses for the API calls made to providers.
Cloud Availability Zones [sn_cld_intg_core_availability_zone]	Availability zones for various providers.
Billing Report Information [sn_cld_intg_core_billing_report_info]	Billing summary reports for billing download jobs.
Billing Import Progress [sn_cld_intg_core_bill_imp_progress]	Import information for various extensions under billing download job.
CI Placement Stats [sn_cld_intg_core_ci_placement_stats]	Status of bookmarks created during Configuration Items placement.
CI Placement Status [sn_cld_intg_core_ci_placement_status]	Configuration Items placement status for extensions executed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
CI Placement Type Information [sn_cld_intg_core_ci_placement_type]	All types of Configuration Items deployed by our product for all providers.
Cost Tags [sn_cld_intg_core_cost_tags]	Mapping information of tag category to cost hash.
Execution [sn_cld_intg_core_execution]	Execution details for all types of running IH flows.
Execution Batch [sn_cld_intg_core_execution_batch]	Execution batches for running the flows.
Execution To Batch Map [sn_cld_intg_core_execution_batch_map]	Mapping information of execution jobs to the respective batches.
Execution Log [sn_cld_intg_core_execution_log]	Log messages for all the executions.
Execution Metric [sn_cld_intg_core_execution_metric]	Metrics for executions.
Execution Monitor [sn_cld_intg_core_execution_monitor]	Live status of the ongoing execution.
Extension [sn_cld_intg_core_ext]	All the available extensions and their details.
Extension Type [sn_cld_intg_core_ext_type]	Types of extensions defined.
Flow Launcher Execution [sn_cld_intg_core_flow_launcher_execution]	Flow launcher job execution details.
Flow Launcher Job [sn_cld_intg_core_flow_launcher_job]	List of flow launcher jobs and their status.
Flow Launcher Job Configuration [sn_cld_intg_core_flow_launcher_job_config]	Configurations for flow launcher jobs.
Flow Launcher Workload [sn_cld_intg_core_flow_launcher_workload]	Workload information for flow launcher executions.
Flow Map [sn_cld_intg_core_flow_map]	Mapping information of input parameters to the flow workloads.
Flow Reflection [sn_cld_intg_core_flow_reflection]	Flow reflection link in flow designer for given context.
Hierarchical Flow Launcher Execution [sn_cld_intg_core_hierarchical_flow_launcher_execution]	Hierarchical flow launcher job execution details.
Imported Date Range [sn_cld_intg_core_imported_date_range]	Imported date range of data during billing download execution.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Instance Family [sn_cld_intg_core_instance_family]	Instance families available for various providers.
Cloud Instance Types [sn_cld_intg_core_instance_type]	Instance types & details for various providers.
Cloud Instance Type Family [sn_cld_intg_core_instance_type_family]	Instance family types available for various providers.
Billing Line Item Types [sn_cld_intg_core_line_item_type]	Types of billing charges for various providers.
Associated Flow Execution [sn_cld_intg_core_m2m_ext_exec_flow_exec]	Mapping information of extension execution to flow execution.
M2m Profile Exec Metrics Profile Table Metrics [sn_cld_intg_core_m2m_profile_exec_metrics_profile_table_metrics]	Mapping information of profile execution to profile table metrics.
Pipeline Stage Extension Type Map [sn_cld_intg_core_map_pp_stage_ext_type]	Mapping information of extension types to their respective stages.
Cloud Operating Systems [sn_cld_intg_core_os_type]	Operating system details for various providers.
Pipeline Execution [sn_cld_intg_core_pp_exec]	Contains all the pipeline executions for billing download.
Execution Stage [sn_cld_intg_core_pp_exec_stage]	Contains all the pipeline executions for each billing download stage.
Extension Execution [sn_cld_intg_core_pp_exec_stage_ext_log]	Pipeline execution logs.
Execution Stage Log [sn_cld_intg_core_pp_exec_stage_log]	Pipeline execution logs for each stage.
Import Stage [sn_cld_intg_core_pp_import_stage]	Executions details for the import state of billing download.
Cloud Price Sheet Version [sn_cld_intg_core_price_sheet_version]	Price sheet status and version for providers.
sn_cld_intg_azure_storage_ps	Store azure storage price sheet details.
Cloud Product Regions [sn_cld_intg_core_product_region]	List of product regions for various providers.
Profile Execution Metrics [sn_cld_intg_core_profile_execution_metrics]	Execution metrics for performance profiling.
Profile Flow Launcher Job Metrics [sn_cld_intg_core_profile_flow_launcher_job_metrics]	Flow launcher execution metrics for performance profiling.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Profile Flow Metrics [sn_cld_intg_core_profile_flow_metrics]	Flow metrics for performance profiling.
Profile Table Metrics [sn_cld_intg_core_profile_table_metrics]	Table metrics for performance profiling.
Cloud Provider Service [sn_cld_intg_core_provider_service]	List of services provided by various cloud providers & their end points.
Cloud Provider Service Action [sn_cld_intg_core_provider_service_action]	Script include actions for the cloud services provided.
Price Sheet Execution [sn_cld_intg_core_ps_download_request]	Price sheet job status and summary.
Execution Item [n_cld_intg_core_ps_download_request_items]	List of items fetched for every price sheet execution.
Price Sheet Download Execution [sn_cld_intg_core_ps_execution]	Price sheet execution and download information for all scheduled job.
Price Sheet Download Job [sn_cld_intg_core_ps_schedule]	List of the price sheet download jobs created.
Cloud Purchase Options [n_cld_intg_core_purchase_option]	Various purchase options available for providers.
Cloud Regions [sn_cld_intg_core_region]	List of cloud regions available for various providers
Resource Group [sn_cld_intg_core_resource_group]	List of resource groups.
RS Metrics Configuration [sn_cld_intg_core_rs_metrics_configuration]	Metric configurations for rightsizing.
Cloud Billing Schedule [sn_cld_intg_core_schedule]	List of billing download jobs created.
Billing Download Execution [sn_cld_intg_core_scheduled_exec]	Billing download execution and download information for all scheduled jobs.
Cloud Integration Action Schedule Job [sn_cld_intg_core_schedule_job]	Scheduled jobs for invoking cloud actions.
Cloud Integration Action Schedule Trigger [sn_cld_intg_core_schedule_trigger]	Triggers for invoking clod actions scheduled jobs
Storage Details Base [sn_cld_intg_core_storage_detail]	Available storage details for providers.
Storage Option [sn_cld_intg_core_storage_option]	Available storage options for providers

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Tag Category [sn_cld_intg_core_tag_category]	List of tag categories having various tags under them.
Tag Name [sn_cld_intg_core_tag_name]	Tag names from the billing data or user generated names.
Tag Name-Category [sn_cld_intg_core_tag_name_category]	Mapping of tag name to category.
Tag Name-Value [sn_cld_intg_core_tag_name_value]	Mapping of tag name to value.
Tag Resource [sn_cld_intg_core_tag_resource]	Tag value pairs associated with a resource.
Tag Value [sn_cld_intg_core_tag_value]	Tag values from the billing data or user generated values.
Test Connection Execution [sn_cld_intg_core_test_connection_execution]	Test connection execution details
Variable [sn_cld_intg_core_variable]	Local variables for integrations core.
GCP CI Placement Type Information [sn_cld_intg_gcp_ci_placement_type]	All types of Configuration Items deployed by Cloud Cost Management for Google Cloud Platform (GCP).
GCP Cost And Usage Bill Data [sn_cld_intg_gcp_cost_usage]	Cost and billing data for GCP.
GCP Product Details [sn_cld_intg_gcp_product_details]	All product details or specifications for GCP.
Google Billing Download Job [sn_cld_intg_gcp_schedule]	Billing download jobs and their status for GCP.
GCP Services [sn_cld_intg_gcp_services]	List of services provided by GCP.
AWS Spend Report Finalization Information [sn_cld_spend_aws_report_finalization_info]	Spend reports finalization status for AWS.
Spend Report Daily Aggregated Cost [sn_cld_spend_core_daily_aggregated_cost]	Spend report on daily basis aggregated on resources.
Spend Report Daily Cost [sn_cld_spend_core_daily_cost]	Spend report for resource usage on daily basis.
Spend Report Forecast Cost [n_cld_spend_core_forecast_cost]	Forecasted spend information.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Spend Report Monthly Cost [sn_cld_spend_core_monthly_cost]	Monthly spend report for resource usage. **Important:** From Cloud Cost Management version 8.1 onward, if you have installed the Cloud Cost Management Infra Stack application, this table won't be populated.
Spend Report Execution Info [sn_cld_spend_core_report_info]	Spend report execution details.
AWS Rightsizing Analytics Report [sn_clin_aws_rs_analytics_report]	Rightsizing report for AWS.
AWS Rightsizing Skipped Instance Families [sn_clin_aws_rs_skipped_instance_family]	AWS instance families that are not considered in rightsizing recommendations.
Azure Rightsizing Analytics Report [sn_clin_azure_rs_analytics_report]	Rightsizing report for Azure.
Cloud Insights Aggregated Cost Saving Snapshot [sn_clin_core_aggregated_cost_saving_snapshot]	Snapshot of aggregated cost for different service accounts.
Cloud Insights Aggregated Potential Saving Snapshot [sn_clin_core_aggregated_potential_saving_snapshot]	Snapshot of aggregated potential savings from various recommendations.
Cloud Insights Aggregated Realized Saving Snapshot [sn_clin_core_aggregated_realized_saving_snapshot]	Snapshot of the actual realised aggregated savings.
Business Hours Cost [sn_clin_core_bh_cost]	Business hours vs non business hours cost for a resource.
Business Hours Policy [sn_clin_core_bh_policy]	List of policies configured for business hours.
Business Hours Policy Execution [sn_clin_core_bh_policy_execution]	Business hours policy execution information.
Business Hours Policy Match [sn_clin_core_bh_policy_match]	Policy matches for various resources in the Business hours cost table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Business Hours Policy Summary [sn_clin_core_bh_policy_summary]	Information summary for the business hour policies.
Cloud Insights Business Hour Recommendations [n_clin_core_bh_recommendation]	Recommendations for business hours.
Business Hours Settings [sn_clin_core_bh_settings]	Settings record for Business hours module.
Budget [sn_clin_core_budget_policy]	List of budget policies & details.
Budget Report Forecast Cost [sn_clin_core_budget_report_forecast_cost]	Spend calculation for the budget.
Budgets Policy Summary [sn_clin_core_budget_summary]	Summaries of budget policies with stats.
Cloud Insights realized saving snapshot [sn_clin_core_daily_realized_saving_snapshot]	Snapshot of the actual realised daily savings.
Excluded Resources Report Mapping [sn_clin_core_exclusion_mapping]	Excluded resource mapping to the type report or recommendation it belongs to.
Excluded Resources [sn_clin_core_excl_res]	List of excluded resources from the Cloud Cost Management modules for different service accounts and providers.
Insights Alias [sn_clin_core_insights_alias]	List of defined aliases for Cloud Cost Management scope.
Insights Alias Mapping [sn_clin_core_insights_alias_mapping]	Alias mapping to the script or action flow for Cloud Cost Management scope.
Insights Execution [sn_clin_core_insights_execution]	Execution details for all Cloud Cost Management executions.
Insights Type [sn_clin_core_insights_type]	List of insights types available for Cloud Cost Management.
M2m Insights Exec Profile Flow Metrics [sn_clin_core_m2m_insights_exec_profile_flow_metrics]	Insights execution to profile flow metrics.
Cloud Insights Policy Action [sn_clin_core_policy_action]	Actions and flows to be executed for a policy.
Policy Change Request Templates [sn_clin_core_policy_change_request_template]	Change request templates for business

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
	hours and unassigned recommendations.
Cloud Insights Policy Match [sn_clin_core_policy_match]	Policy matches for various resources and modules.
Policy Summary [sn_clin_core_policy_summary]	Summary of all the policies available
Policy [sn_clin_core_pol_policy]	Policies to be applied on various modules.
Cloud Insights potential saving snapshot [sn_clin_core_potential_saving_snapshot]	Snapshot of the actual realised savings.
Cloud Insights Recommendations [sn_clin_core_recommendation]	Recommendations for Cloud Cost Management modules.
Recommendation Action Job Execution [sn_clin_core_recommendation_action_job_execution]	Job execution status for recommendations.
Reserved Instance Settings [sn_clin_core_reserved_instance_settings]	Settings record for Reserved Instance module.
Reserved Instance Recommendation [sn_clin_core_ri_recommendation]	Recommendations for reserved instances modules.
Rightsizing Analytics Report [sn_clin_core_rs_analytics_report_base]	Potential resources for rightsizing recommendations.
Cloud Insights Job [sn_clin_core_rs_job]	List of jobs for rightsizing or unused machines module.
Cloud Insights Rightsizing Recommendation Automatic [sn_clin_core_rs_recommendation_automatic]	Rightsizing recommendations.
Cloud Insights Rightsizing Recommendation [sn_clin_core_rs_recommendation_base]	Parent table for rightsizing or unused recommendations.
Rightsizing Settings [sn_clin_core_rs_settings]	Settings record for Rightsizing module.
Cloud Insights Unused Recommendation [sn_clin_core_rs_unused_recommendation]	Unused resources recommendations.
Service Account Owner Update Policy [sn_clin_core_sa_owner_policy]	Policies to update the service account owners.
Insights Settings[sn_clin_core_settings]	Settings for various Cloud Cost Management modules.
Tag key [sn_clin_core_tag_key]	Tag keys derived from billing data as well as user generated keys.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Unassigned Resources Count [sn_clin_core_unassigned_count]	Count of unassigned resources for various service accounts.
Cloud Insights Unassigned Policies [sn_clin_core_unassigned_policy]	Policies available for unassigned resources.
Policy CI View [sn_clin_core_unassigned_policy_ci_view_list]	Used for generating unassigned resources count. Contains information about the table to be queried and the encoded query and the columns to be queried in the specified table. The records in this table are manually hardcoded.
Unassigned Policy Summary [sn_clin_core_unassigned_policy_summary]	Policy summaries available for unassigned resources.
Unassigned Recommendations [sn_clin_core_unassigned_recommendation]	Unassigned recommendations with assignment group, generated based on matched policies.
Unassigned Report [sn_clin_core_unassigned_report]	Reports or policy match for various unassigned resources.
Unassigned Resources [sn_clin_core_unassigned_resource]	List of unassigned resources on which policies can be applied.
Unassigned Resource Settings [sn_clin_core_unassigned_settings]	Settings record for Unassigned resources module.
Unused Machine Settings [sn_clin_core_unused_settings]	Settings record for Unused machines module.
Spend Report Monthly Aggregated Costs [sn_cld_spend_core_monthly_aggregated_cost]	Stores spend for all resources over a time range or a cost type.
Multi currency setups [sn_cld_spend_core_multi_currency_setup]	Stores currency options for the Multi-currency setup.

Important: The following tables are used only when the Cloud Cost Management Infra Stack application is installed in addition to Cloud Cost Management version 8.1.

Resource Average Costs	Average daily cost of the resource. This

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
[sn_cld_intg_core_resource_avg_cost_list]	average daily cost is used to calculate savings for unused recommendations.
Google Policy Usage Last Downloaded [sn_cld_intg_gcp_resource_usage_last_downloaded]	Usage last downloaded timestamp of the resources. This helps in downloading only the delta usage for Business hours.
AWS billing job files [sn_cld_intg_aws_billing_files]	Reference and status of the attachments of billing CSV files downloaded for a corresponding billing job of AWS assume role setup.
Azure billing Job chunk blob detail [sn_cld_intg_azure_job_chunk_blob_detail]	Tracking and download URLs of Azure billing CSV data for a given date range corresponding to a billing job. Blobs are generated on Glide and download URLs are passed to the backend.
Resource Latest Usage sn_cld_intg_core_resource_latest_usage	Latest usage date and corresponding pivot key of the supported resources like VM, DB, storage, and snapshots for a specific provider. Resources used on the previous day are used for license calculation.
Spend Report Monthly Provider Agg Cost sn_cld_spend_core_monthly_provider_agg_cost	Cloud Cost Management Workspace loads data from these tables when a user logs in with the insights_admin role. These tables contain monthly aggregated spend data based on various categories such as Provider and Region.
Spend Report Monthly Master Account Agg Cost sn_cld_spend_core_monthly_master_account_agg_cost	
Spend Report Monthly Service Account Agg Cost	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
sn_cld_spend_core_monthly_service_account_agg_cost	
Spend Report Monthly Purchase Option Agg Cost sn_cld_spend_core_monthly_purchase_option_agg_cost	
Spend Report Monthly Region Agg Cost sn_cld_spend_core_monthly_region_agg_cost	
Spend Report Monthly Cloud Category Agg Cost sn_cld_spend_core_monthly_cloud_category_agg_cost	
Spend Report Monthly Service Category Agg Cost sn_cld_spend_core_monthly_service_category_agg_cost	
Spend Report Monthly Resource Group Agg Cost sn_cld_spend_core_monthly_resource_group_agg_cost	
Spend Report Monthly Tag Agg Cost sn_cld_spend_core_monthly_tag_agg_cost	

System properties for Cloud Cost Management

These system properties are available for the Cloud Cost Management application.

Access system properties by navigating to **All** > **System properties** > **All properties.**. You can set some property values on the System Properties form, but other lesser-used properties are available only on the System Property [sys_properties] table.

System properties for Billing Download jobs

System property	Description
sn_cld_intg_core.ci_placement_threads_number	Number of threads that are used by CI placement flow to create CIs in the billing process. • Type: integer • Default value: 4
sn_cld_intg_aws.max_unprocessed_records_for_placement	Maximum number of records to read in one batch from the AWS Cost And Usage Bill Data table for CI Placement.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for Billing Download jobs (continued)

System property	Description
	• Type: integer • Default value: 300000
sn_cld_intg_aws.min_unprocessed_records_for_ci_placement	Minimum number of records to read in one batch from the AWS Cost And Usage Bill Data table for CI Placement. • Type: integer • Default value: 100000

System properties for Spend analysis

System property	Description
sn_cld_spend_core.metricbase_transform_limit	Maximum number of Billing records to use in one Metric Base transform. • Type: integer • Default value: 20000
sn_cld_spend_core.spend_report_flow_launcher_chunk_size	Number of non-empty CI chunks to send to the spend flow launcher. • Type: integer • Default value: 40
sn_cld_spend_core.spend_report_per_chunk_workload_size	Number of workloads (CI ranges and metadata) for each chunk in the spend flow launcher. • Type: integer • Default value: 500
sn_cld_spend_aws.num_months_forecast	Number of future months after the current month for which the AWS Forecast spend is retrieved during every execution of the Spend job. • Type: integer • Default value: 2
sn_cld_spend_core.favourite_views_limit	The maximum number of spend views that a user can mark as favorites. The request to mark a view as favorite is rejected after the user reaches this value.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for Spend analysis (continued)

System property	Description
	• Type: integer • Default value: 10

System properties for Business Hours

Note: The collection of data for a single download of billing or price sheet data is called a workload. Data in a workload is held in sets of data called chunks. You can specify the size of each chunk and the number of chunks in a workload.

System property	Description
sn_clin_core.bh_report.batch_size	The number of resources to include in a Business Hours report batch. • Type: integer • Default value: 5000
sn_clin_core.bh_recom_max_chunk_size	Number of records used to create workload chunks of rightsizing recommendations. If you set a value greater than glide.db.max_view_records, then the glide.db.max_view_records value is used instead. A smaller number means more chunks and a larger number means fewer chunks. Records considered in one execution of generating recommendations = (number of chunks) * (data records/chunk) • Type: integer • Default value: 10000
sn_clin_core.bh_recom_num_chunks_per_workload	Number of chunks per workload. This value times the value of sn_clin_core.bh_recom_max_chunk_size is the total number of records per workload when generating rightsizing recommendations. Records considered in one execution of generating recommendations = (number of chunks) * (data records/chunk) • Type: integer • Default value: 10

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for Microsoft Azure

System property	Description
mid.azure_action.batch_size	Use `batch_size` to set the batch size to fewer than 20 for action calls like Stop, Start, Modify (resize), Terminate, and Describe. Cloud Cost Management uses the Azure Batch API to make a bulk request for the actions. By default, Azure Batch supports a maximum of 20 for the synchronous call. • Type: integer • Default value: 20

System properties for Rightsizing and Unused resources operations for Microsoft Azure

Note: The collection of data for a single set of recommendations is called a workload. Data in a workload is held in sets of data called chunks. You can specify the size of each chunk and the number of chunks in a workload.

System property	Description
sn_cld_intg_azure.az_rs_recommendation_queue_polling_interval	Polling interval for the Microsoft Azure recommendation orchestrator to check the status of the `generate`, `get generate status`, `list recommendation`, or `process recommendation` call and move it to the next stage for processing. **Note:** A short polling time is better if there are fewer subscriptions. • Type: integer • Default value: 5000 (ms)
sn_cld_intg_azure.chunk_size_generate_recommendation_subscriptions	Number of subscriptions to be processed by each workload. Each workload creates a maximum of 5 threads to process 10 subscriptions in parallel based on the available MID Server worker threads. Changing the setting to lower number increases the number of workloads created. `Generate Recommendation` is an asynchronous API call that quickly returns the generate recommendation operation ID.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for Rightsizing and Unused resources operations for Microsoft Azure

Note: The collection of data for a single set of recommendations is called a workload. Data in a workload is held in sets of data called chunks. You can specify the size of each chunk and the number of chunks in a workload.

(continued)

System property	Description
	Note: For fewer than 50 subscriptions, you can decrease the value to enable parallel processing. For example, for 40 subscriptions, changing the chunk size to 10 allows 4 workloads to process subscriptions. By default, a maximum of 3 parallel workload executions are allowed. The maximum is configured in the flow launcher job that is defined in the `sn_cld_intg_core_flow_launcher_job_confi` table. • Type: integer • Default value: 5
sn_cld_intg_azure.advisor_get_status_min_chunk_size	Minimum number of subscriptions to process in a workload for `Get generate status` API call. The call creates a workload when the specified minimum chunk size is met and, after all subscriptions are processed, doesn't create another workload. **Note:** By default, a maximum of 4 parallel workload executions are allowed. The maximum is configured in the flow launcher job that is defined in the `sn_cld_intg_core_flow_launcher_job_confi` table. • Type: integer • Default value: 5
sn_cld_intg_azure.advisor_list_recommendation_min_chunk_size	Minimum number of subscriptions to process in a workload for the `list recommendation` API call. The call creates a workload when the specified minimum chunk size is met and,

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for Rightsizing and Unused resources operations for Microsoft Azure

Note: The collection of data for a single set of recommendations is called a workload. Data in a workload is held in sets of data called chunks. You can specify the size of each chunk and the number of chunks in a workload.

(continued)

System property	Description
	after all subscriptions are processed, doesn't create another workload. **Note:** Increasing the chunk size might increase the overall processing time because subscriptions are processed sequentially. By default, a maximum of 4 parallel workload executions are allowed. The maximum is configured in the flow launcher job that is defined in the `sn_cld_intg_core_flow_launcher_job_confi` table. • Type: integer • Default value: 1
sn_clin_azure.advisor_process_recommendation_min_chunk_size	The number of recommendation responses that should be processed in a workload for the API call and persisted in the Rightsizing or Unused Machines recommendation table. The call creates a workload when the specified minimum chunk size is met and, after all subscriptions are processed, doesn't create another workload. **Note:** Increasing the chunk size might increase the overall processing time because subscriptions are processed sequentially. By default, a maximum of 4 parallel workload executions are allowed. The maximum is configured in the flow launcher job that is defined in the `sn_cld_intg_core_flow_launcher_job_confi` table. • Type: integer • Default value: 20

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for AWS Pricesheet

System property	Description
sn_cld_intg_aws.pricesheet_timeout_aws	Controls AWS price sheet download flow time out duration. • Value format: DD HH:MM:SS • Default value: 2 days

System properties for Cloud Cost Management Infra Stack

Important: These system properties are used only if the Cloud Cost Management Infra Stack application is installed in addition to the Cloud Cost Management version 8.1.

System property	Description
sn_cld_intg_core.optimize_pivot_keys	Enables the option to limit the columns used for pivot key generation so that multiple cost line items map to a single pivot key, which decreases the number of entries in the cost usage table. • Type: true | false • Default value: false
sn_cld_intg_core.sink_only_required_ci_types	Enables the option that only the line items that have the CI types - cmdb_ci_vm_instance, cmdb_ci_database, cmdb_ci_cloud_database, cmdb_ci_storage_volume, cmdb_ci_storage_vol_snapshot, are sent to Glide for storage in the cost usage table, reducing the data that is transmitted. • Type: true | false • Default value: false
sn_cld_intg_core.enable_tag_filtering	Enables the option that only the tag names that are mapped to tag categories in the Cloud Cost Management Workspace are considered to save the tag values. This verification optimizes the memory requirement to transfer the tags to Glide. • Type: true | false • Default value: false
ready.job.files.timeout	Maximum time in minutes to generate billing files for AWS assume role setup or blobs for Azure on Glide.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for Cloud Cost Management Infra Stack

Important: These system properties are used only if the Cloud Cost Management Infra Stack application is installed in addition to the Cloud Cost Management version 8.1.

(continued)

System property	Description
	You can monitor the AWS billing job files [sn_cld_intg_aws_billing_files] table for AWS and the Azure billing Job chunk blob detail [sn_cld_intg_azure_job_chunk_blob_detail] table for Azure only when the download is in progress and the time-out condition is met. • Type: String • Default value: 180
ready.job.nofiles.timeout	Maximum time in minutes to wait for the backend to pick up the job when there's no other job being processed for the same provider. **Important:** To configure this system property, contact your support team. Don't configure it on your own. • Type: String • Default value: 10
reserved.job.timeout	Maximum time in minutes to wait for the job to change from Reserved to In progress state. **Important:** To configure this system property, contact your support team. Don't configure it on your own. • Type: String • Default value: 5
inprogress.job.timeout	Maximum time in minutes to wait for the job to change from In progress to Sink complete state. **Important:** To configure this system property, contact your support team. Don't configure it on your own.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for Cloud Cost Management Infra Stack

Important: These system properties are used only if the Cloud Cost Management Infra Stack application is installed in addition to the Cloud Cost Management version 8.1.

(continued)

System property	Description
	• Type: String • Default value: 10
sinkcomplete.job.timeout	Maximum time in minutes to wait for the job to change from Sink begin to Sink complete state. **Important:** To configure this system property, contact your support team. Don't configure it on your own. • Type: String • Default value: 20
billing.data.post.processing.timeout	Maximum waiting time in minutes for billing from Post processing to Complete phase. The final stage of billing job includes inserting spend data into Glide. During the Post processing phase, the newly inserted data is activated and the existing data is inactivated. Increasing the time out value gives more time for the activation flow to complete. • Type: String • Default value: 30
retry.cred.failed.billing.job.timeout	Maximum time in minutes to wait before canceling a job that's in the Requested state due to credential failure. When you add a credential, it's sent to the backend only in the next billing run, resulting in a temporary failure. However, retries are made to establish a connection. This property specifies how long to wait before canceling the reattempted job. • Type: String • Default value: 30

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System properties for Cloud Cost Management Infra Stack

Important: These system properties are used only if the Cloud Cost Management Infra Stack application is installed in addition to the Cloud Cost Management version 8.1.

(continued)

System property	Description
sn_cld_intg_azure.billing_chunk_duration	Defines the chunk size for Azure billing blob in days. By default, each blob contains billing data for three days. • Type: Number • Default value: 3

System properties for Multi-currency setup

System property	Description
sn_cld_intg_core.enable_multicurrency_setup	Enables the multi-currency setup feature for users. • Type: true | false • Default value: true
sn_cld_spend_core.aws_exchange_rate_date	Sets up the currency exchange rate date for AWS. Type: integer
glide.currency2.system_rate_<table>	Eliminates the need to maintain a separate custom exchange rate table exclusively for Cloud Cost Management. To use an existing exchange rate table from another application, enter its name as the value for this property. • Type: String • Value: name of the table
sn_cld_spend_core.ccm_custom_conversion_rate_<table>	Sets up the currency exchange rates based on the preferred currency. The table to be used for conversion should extend to the System Currency Conversion Rates [fx_conversion_rate] table. • Type: String • Value: name of the table

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cloud service categories in Cloud Cost Management for Amazon AWS Cloud services

In Cloud Cost Management, provider services are grouped into service categories. This grouping enables you to use filters to focus your analysis on particular types of service (for example, Compute or Database). To perform more targeted analysis, you can filter for particular services within a service category (for example, Amazon ElastiCache or Azure Database for PostgreSQL are services in the Database category).

Service categories in Cloud Cost Management for Amazon AWS Cloud services

Cloud service in AWS	Cloud Cost Management Service Category
Alexa for business	Business Productivity
Amazon API Gateway	Application Services
Amazon Athena	Analytics
Amazon Aurora	Database
Amazon Chime	Business Productivity
Amazon Cloud Directory	Security
Amazon CloudFront	Network
Amazon CloudSearch	Analytics
AmazonCloudWatch	Management Tools
Amazon Cognito	Security
Amazon Comprehend	Machine Learning
Amazon Connect	Application Services
Amazon DocumentDB	Database
Amazon DynamoDB	Database
Amazon EC2 Auto Scaling	Compute
Amazon EC2 Container Service	Compute
Amazon ElastiCache	Database
Amazon Elastic Block Store	Storage
Amazon Elastic Compute Cloud	Compute
Amazon Elastic Container Registry	Compute
Amazon Elastic File System	Storage
Amazon Elasticsearch Service	Analytics
Amazon Elastic Transcoder	Application Services
Amazon EMR	Analytics
Amazon FreeRTOS	IOT
Amazon GameLift	Application Services
Amazon Glacier	Storage
Amazon GuardDuty	Security

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cloud service in AWS	Cloud Cost Management Service Category
Amazon Inspector	Security
Amazon Kinesis	Analytics
Amazon Kinesis Video Streams	Application Services
Amazon Lex	Machine Learning
Amazon Lightsail	Compute
Amazon Machine Learning	Machine Learning
Amazon Macie	Security
Amazon MQ	Application Services
Amazon Neptune	Database
Amazon Pinpoint	Mobile
Amazon Polly	Machine Learning
Amazon QuickSight	Analytics
Amazon Redshift	Database
Amazon Rekognition	Machine Learning
Amazon Relational Database Service	Database
Amazon Route 53	Network
Amazon SageMaker	Application Services
Amazon SimpleDB	Database
Amazon Simple Email Service	Application Services
Amazon Simple Notification Service	Tools
Amazon Simple Queue Service	Application Services
Amazon Simple Storage Service	Storage
Amazon Simple Workflow Service	Productivity
Amazon Sumerian	Application Services
Amazon Transcribe	Machine Learning
Amazon Translate	Machine Learning
Amazon Virtual Private Cloud	Network
Amazon WorkDocs	Business Productivity
Amazon WorkMail	Productivity
Amazon Workspaces	Productivity
AWS (Unknown Product)	Application Services
AWS Application Discovery Service	Application Services
AWS AppSync	Mobile
AWS Auto Scaling	Management Tools
AWS Batch	Compute

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cloud service in AWS	Cloud Cost Management Service Category
AWS Certificate Manager	Security
AWS Cloud9	Developer Tools
AWS CloudFormation	Compute
AWS CloudHSM	Security
AWS Cloud Map	Network
AWS CloudShell	Developer Tools
AWS CloudTrail	Tools
AWS CloudWatch	Tools
AWS CodeBuild	Developer Tools
AWS CodeCommit	Developer Tools
AWS CodeDeploy	Developer Tools
AWS CodePipeline	Developer Tools
AWS CodeStar	Developer Tools
AWS Config	Tools
AWS Cost Explorer	Management Tools
AWS Database Migration Service	Database
AWS Data Pipeline	Analytics
AWS DataSync	Application Services
AWS Device Farm	Mobile
AWS Direct Connect	Network
AWS Directory Service	Security
AWS Elastic Beanstalk	Compute
AWS Elastic Block Store	Storage
AWS Elastic Compute Cloud	Compute
AWS Elastic Load Balancing	Load Balancer
AWS Elemental MediaConvert	Application Services
AWS Elemental MediaLive	Application Services
AWS Elemental Mediapackage	Application Services
AWS Elemental MEdiaStore	Application Services
AWS Elemental MediaTailor	Application Services
AWS Fargate	Compute
AWS Glue	Analytics
AWS Greengrass	IOT
AWS Identity and Access Management	Security
AWS IoT	IOT

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cloud service in AWS	Cloud Cost Management Service Category
AWS IoT 1-Click	IOT
AWS IoT Analytics	IOT
AWS IoT Core	IOT
AWS IoT Device Management	IOT
AWS IoT Events	IOT
AWS Key Management Service	Security
AWS Lambda	Compute
AWS Lamda	Compute
AWS Mobile Hub	Mobile
AWS OpsWorks	Management Tools
AWS Relational Database Service	Database
AWS Route 53	Network
AWS Secrets Manager	Security
AWS Service Catalog	Management Tools
AWS Shield	Security
AWS Simple Notification Service	Tools
AWS Simple Storage Service	Storage
AWS Snowball	Storage
AWS Snowball Edge	Storage
AWS Snowmobile	Storage
AWS Step Functions	Application Services
AWS Storage Gateway	Storage
AWS Systems Manager	Management Tools
AWS Trusted Advisor	Management Tools
AWS Virtual Private Cloud	Network
AWS WAF	Security
AWS X-Ray	Developer Tools
Elastic Load Balancing	Load Balancer

Cloud service categories in Cloud Cost Management for Microsoft Azure services

In Cloud Cost Management, provider services are grouped into service categories. This grouping enables you to use filters to focus your analysis on particular types of service (for example, Compute or Database). To perform more targeted analysis, you can filter for particular services within a service category (for example, Amazon ElastiCache or Azure Database for PostgreSQL are services in the Database category).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Service categories in Cloud Cost Management for Microsoft Azure services

Services in Microsoft Azure	Cloud Cost Management Service Category
Advanced Threat Protection	Security
API Management	Tools
App Center	Application Services
Application Gateway	Network
Application Insights	Management Tools
Automation	Management Tools
Azure Active Directory B2C	Security
Azure Active Directory Domain Services	Security
Azure Alert	Event
Azure Analysis Services	Analytics
Azure API for FHIR	Application Services
Azure App Service	Compute
Azure ARM	Compute
Azure Bastion	Network
Azure Blockchain	Blockchain
Azure Bot Service	Machine Learning
Azure Cosmos DB	Database
Azure Database for MariaDB	Database
Azure Database for MySQL	Database
Azure Database for PostgreSQL	Database
Azure Database Migration Service	Database
Azure Databricks	Analytics
Azure Data Explorer	Analytics
Azure Data Factory	Database
Azure Data Factory v2	Database
Azure Data Share	Analytics
Azure DDOS Protection	Network
Azure DevOps	Developer Tools
Azure DNS	Network
Azure Firewall	Network
Azure Firewall Manager	Network
Azure Front Door Service	Network
Azure Lab Services	Developer Tools

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Services in Microsoft Azure	Cloud Cost Management Service Category
Azure Machine Learning	Machine Learning
Azure Maps	IOT
Azure Monitor	Management Tools
Azure NetApp Files	Storage
Azure Remote Rendering	Application Services
Azure Search	Machine Learning
Azure Site Recovery	Management Tools
Azure Spring Cloud	Application Services
Azure Stack	Hybrid Cloud
Azure Stack Edge	Machine Learning
Azure Synthetics	Application Services
Backup	Management Tools
Bandwidth	Compute
BizTalk Services	Application Services
Cloud Services	Compute
Cognitive Services	Machine Learning
Container Instances	Containers
Container Registry	Containers
Content Delivery Network	Network
Cost Management	Management Tools
Data Box	Storage
Data Catalog	Analytics
Datacenter Capacity	Application Services
Data Lake Analytics	Analytics
Data Lake Store	Analytics
Data Management	Application Services
Digital Twins	IOT
Dynamics 365 for Customer Insights	Management Tools
Event Grid	Management Tools
Event Hubs	Analytics
ExpressRoute	Network
Functions	Compute
GitHub	Management Tools
HDInsight	Analytics
HPCCache	Storage

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Services in Microsoft Azure	Cloud Cost Management Service Category
Insight and Analytics	Analytics
IoT Central	IOT
IoT Hub	IOT
Key Vault	Security
Kusto	Application Services
Load Balancer	Load Balancer
Log Analytics	Analytics
Logic Apps	Tools
Machine Learning Service	Machine Learning
Machine Learning Studio	Machine Learning
Marketplace	Marketplace
Media Services	Application Services
Microsoft.ApiManagement	Application Services
Microsoft.BlockStorage	Storage
Microsoft.Cache	Application Services
Microsoft.Compute	Compute
Microsoft.DocumentDB	Database
Microsoft.Insights	Tools
Microsoft.LoadBalancer	Load Balancer
Microsoft.Network	Network
Microsoft.Security	Security
Microsoft.ServiceBus	Tools
Microsoft.Sql	Database
Microsoft.Storage	Storage
Microsoft.Web	Application Services
Microsoft (Unknown Product)	Application Services
Microsoft Azure Internet Analyzer	Network
Microsoft Azure Peering Service	Network
Microsoft Genomics	Application Services
Mixed Reality	Virtual Reality
Multi-Factor Authentication	Security
NAT Gateway	Network
Network Watcher	Management Tools
Notification Hubs	IOT
PlayFab	Application Services

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Services in Microsoft Azure	Cloud Cost Management Service Category
Power BI Embedded	Analytics
Redis Cache	Database
Scheduler	Management Tools
Security Center	Security
Sentinel	Security
Service Bus	Management Tools
Service Fabric	Compute
Service Fabric mesh	Compute
SignalR	Application Services
Spatial Anchors	Virtual Reality
Specialized Compute	Compute
SQL Advanced Threat Protection	Security
SQL Database	Database
SQL Data Warehouse	Database
SQL DB Edge	Database
SQL Server Stretch Database	Database
Storage	Storage
StorSimple	Storage
Stream Analytics	Analytics
Time Series Insights	IOT
Traffic Manager	Management Tools
Virtual Machines	Compute
Virtual Machines Licenses	Compute
Virtual Network	Network
Virtual WAN	Security
Visual Studio Online	Management Tools
Visual Studio Subscription	Developer Tools
VPN Gateway	Network
Windows 10 IoT Core Services	IOT
Xamarin University	Application Services

Cloud service categories in Cloud Cost Management for Google Cloud services

In Cloud Cost Management, provider services are grouped into service categories. This grouping enables you to use filters to focus your analysis on particular types of service (for example, Compute or Database). To perform more targeted analysis, you can filter for particular services within a service category (for example, Amazon ElastiCache or Azure Database for PostgreSQL are services in the Database category).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Service categories in Cloud Cost Management for Google Cloud services

Cloud service in Google Cloud	Cloud Cost Management Service Category
Bigtable	Database
Cloud Storage	Storage
Cloud SQL	Database
Database Migration	Database
Datastore	Database
Data Transfer	Storage
Development Manager	Tools
Endpoints	Tools
File Store	Storage
Firestore	Database
Hybrid Connectivity	Network
Memorystore	Database
Network Intelligence	Network
Network Security	Network
Network services	Network
Service Catalog	Tools
VPC network	Network

List of Budget policy creation fields

Fields on the Budget policy creation form help you create a budget policy to specify a budgeted amount, cost type, reset period, and other aspects of the budget.

Budget policy creation

Field	Description
Budget policy	List of created budget policies. If you want to update a budget policy, search and select a created budget policy from the drop-down list. After you select a budget, all the relevant fields get automatically populated.
Active	Option to apply the policy, which executes Budget Forecast analysis whenever billing data is updated.
Name	A unique name that describes the policy for other users.
Description	A unique description that describes the policy for other users.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Budget policy creation (continued)

Field	Description
Cost type	Contractual payment agreement with the provider. • Amortized: Your organization pays the effective cost of the upfront and monthly reservation fees spread across the billing period. The amortized cost type is described in detail on the provider site. • Actual: Each billing period, your organization pays for direct cloud services.
Start month	Month from which the plan applies.
End month	Month until when the plan applies.
Start day	Date from which the plan applies.
End day	Date until when the plan applies.
Start year	Year from which the plan applies.
End year	Year until when the plan applies.
Currency	Currency type of the policy.
Amount	Total spend that is budgeted for the time period that is specified by the Granularity value. **Calculated** Behaves in the same way as the default currency field type. Whenever conversions are performed, the system uses the latest currency conversion rates. The amount appears in the session currency for the user. **Fixed** The amount displays in the currency code that you used when you entered the Amount value. Conversions use the latest currency conversion rates. **Multiple** Enables you to enter multiple amounts using a different currency for each amount. The field value is the value entered in the user's session currency. Otherwise, the first value entered converts to the user's session currency. Conversions use the latest currency rates. **Note:** The first amount entered is used during display. The other values aren't used to perform calculations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Budget policy creation (continued)

Field	Description
	The session currency for the instance determines the numbers that a user sees on budget reports. If the currency you specify in the Budget plan differs from the session currency, then the amount displays in the reports in two fields: • **Budgeted amount**: The money amount expressed in the currency used in the plan. • **Converted budget amount**: The same money amount, expressed in the session currency.
Granularity	Reset period for the budget. • **Annual**: The Amount value applies to a one-year period. • **Monthly**: The Amount value applies to a one-month period.
Account and Resource criteria	
Parent account	The primary account with which the service accounts are associated. **Note:** While editing a policy, changing the parent account can change the provider.
Service accounts	The service accounts to apply the plan to. Move all appropriate service accounts to the **Selected** list. For Google Cloud only, this field is called Projects.
Tag category condition	Add tag category by selecting a tag category from the drop-down list and by adding tag values separated by comma.
Budget Viewer and Notifications	
Viewer (user)	User that can view this Budget policy. **Note:** Regardless of this selection, only users that also have the Cloud Budget Viewer [sn_clin_core.budget_viewer] role have viewing access.
Viewer (group)	User group that can view this Budget policy.
Notification frequency	The recurrence of email to users as described in Users to notify.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Budget policy creation (continued)

Field	Description
User to be notified	Users to notify by email when the following conditions occur: • Budget is forecast to be exceeded. • Budget is exceeded. • Budget is invalid.

List of Shared cost allocation policy fields

Fields on the Shared cost allocation policy creation form help you create a shared cost allocation policy.

Shared cost allocation policy creation form

Field	Description
Select shared cost policy to edit	The shared cost policy that you want to edit.
Active	The option to apply the policy. Selecting the **Active** check box enables shared cost allocation whenever billing data is updated.
Name	A unique name that describes the policy for other users.
Description	A brief description of the policy.
Run order	The order in which to apply policies. Each policy must have a unique value. The system applies policies in low-to-high run order and performs the actions for the first policy that matches. After a match, no other policy is applied to the resource.
Start month	The start month from when the monthly spend records are processed. This field is automatically set to the current month. **Note:** The Start month must be before the End month.
End month	The month till when the monthly spend records are processed. **Note:** The End month must be after the Start month.
Start year	The start year from when the monthly spend records are processed. This field is automatically set to the current year.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Shared cost allocation policy creation form (continued)

Field	Description
	Note: The Start year must be before the End year.
End year	The year till when the monthly spend records are processed. **Note:** The End year must be after the Start year.
Provider	The cloud provider to apply the policy to. **Note:** You can't change the provider while editing an existing policy.
Service category	List of all service categories that the policy applies to.
Service accounts	The service accounts to apply the policy to. For Google Cloud only, this field is called Projects.
Cloud service	Cloud service that the policy applies to. • All • Specific
Select cloud service	The cloud service that the policy you want to apply to. This field appears only when **Specific** is selected from **Cloud Service**.
Resource type	Resource type of the Kubernetes service category. • Cloud resource • Kubernetes cluster This field appears only when **Kubernetes Service** is selected from **Service category**.
Region	Region of the resource that the policy applies to. • All • Specific
Select region	The region of the resource that the policy you want to apply to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Shared cost allocation policy creation form (continued)

Field	Description
	This field appears only when **Specific** is selected from **Region**.
Purchase option	Purchasing options for your cloud resources. • On demand • Reserved • Savings plans • Tax • Unknown
Select the tag	
Business unit	Business unit of the resource to which the policy applies to. • All • Specific
Select business unit	The business unit of the resource that the policy you want to apply to. This field appears only when **Specific** is selected from **Business unit**.
Department	The department of the resource that the policy you want to apply to. • All • Specific
Select department	The department of the resource that the policy you want to apply to. This field appears only when **Specific** is selected from **Department**.
Division	The department division of the resource that the policy you want to apply to. • All • Specific
Select division	The department division of the resource that the policy you want to apply to. This field appears only when **Specific** is selected from **Division**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Shared cost allocation policy creation form (continued)

Field	Description
Cost center	Cost center of the resource that the policy is applied to. • All • Specific
Select cost center	The cost center of the resource that the policy you want to apply to. This field appears only when **Specific** is selected from **Cost center**.
Allocation type	Allocation type to be used while defining the shared cost allocation policy. • **Fixed**: The allocation percentage is specified in the Cost distribution section for each group.#For example, if the cost of a cloud service is shared with two other groups, specify the allocation percentage for each group. • **Even**: The allocation is split across the allocation groups evenly.#For example,if the cost of a cloud service is shared with two other groups, the allocation percentage is automatically populated evenly among these groups. • **Proportional**: Policy for cloud services and service categories, or both, is defined. #The combination of these attributes is considered for shared cost allocation. #For example, if a policy is defined for the following combination, then all costs associated with this combination would be considered for shared cost. ○ Service category: Database and Cloud service: Amazon#DocumentDB ○ Service category: Database and Cloud service: Empty Here, all Database category cloud services are considered as shared cost. The allocation percentage is automatically populated based on the direct cost of the resources.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Shared cost allocation policy creation form (continued)

Field	Description
	Note: • The sum of allocation percentages across the groups must be 100%. • The allocation percentage can't be negative. • The combination of groups must be unique.
Cost distribution	Add Business unit, Division, Department, Cost center, and Allocation percentage to distribute the resource costs among various business lines by selecting **Add**.
Namespace Distribution	For Kubernetes, add Namespace and Allocation percentage to distribute the resource costs among various business lines by selecting **Add**. This field appears only when **Kubernetes Service** is selected from **Service category** and **Kubernetes cluster** is selected from **Resource type**. **Note:** The allocation type that you can define can be only Fixed and Even.
Allocation percentage	Percentage of the shared cost allocation for each cloud resource.

List of default tag categories

View the list of default tag categories on the Tag categories page. A tag category helps you to enable multiple tag names for representing costs against a single business entity.

You can view the list of default categories by navigating to *`Cloud Cost Management Workspace`* > **Operations** > **Cost usage tags** > **Tag categories**.

Default tag categories
Application feature
Application owner
Application team
AI Service

Important: This tag category is available with the Cloud Cost Management 8.0.0 version or later.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Default tag categories
Note: If you want to associate a tag name with its corresponding tag value whenever a new AI service or a category within an existing AI service is introduced for Amazon Web Services (AWS), Microsoft Azure, or Google Cloud Platform (GCP), see Add or update a tag value for an AI Service tag category.
Business application
Business service
Business unit
Cost center
Department
Division
Environment
Kubernetes cluster name

Related topics

Cost usage tags

Create and update a tag category

List of default Cloud categories for AI services

List of default Cloud categories applicable to the Machine Learning service category for managing AI services.

Default provider-specific AI services

Service provider	AI services
Amazon Web Services (AWS)	• Amazon CodeGuru • Amazon Comprehend • Amazon Comprehend Medical • Amazon DevOps Guru • Amazon Forecast • Amazon Fraud Detector • AWS HealthLake • Amazon Kendra • Amazon Lex • Amazon Lookout for Equipment • Amazon Lookout for Metrics • Amazon Lookout for Vision • Amazon Monitron • Amazon Omics • Amazon Personalize • Amazon Polly

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Default provider-specific AI services (continued)

Service provider	AI services
	• Amazon Rekognition • Amazon Textract • Amazon Transcribe • Amazon Translate • Amazon Augmented AI
Microsoft Azure	• Azure Cognitive Services • Azure AI Search • Azure AI Bot Service
Google Cloud Platform (GCP)	• Cloud Dialogflow API • Cloud Document AI API • Cloud Document API • Cloud Natural Language • Cloud Speech API • Cloud Text-to-Speech API • Cloud Video Intelligence API • Cloud Vision API • Translate • Vertex AI Vision • Vertex AI • Vertex AI Search

Related topics

Add or update a tag value for an AI Service tag category

Supported CI class types for Amazon AWS Cloud services

Supported CI class types for AWS enable assigning cost and usage data correctly using the CI placement process. The CI placement process places a subset of CIs into corresponding CI tables that are used in the recommendation generation process for Cloud Cost Management.

Note: All the supported CI class types are placed after the Cumulus Unsupported CI Placement scheduled job runs daily. Some of the CI class types are placed immediately after Billing Download job execution.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Supported CI class types

All supported CI class types	CI class types that are placed immediately after job execution
cmdb_ci_storage_vol_snapshot	cmdb_ci_vm_instance
cmdb_ci_cloud_database	cmdb_ci_cloud_database
cmdb_ci_storage_volume	cmdb_ci_storage_volume
cmdb_ci_cloud_gateway	cmdb_ci_storage_vol_snapshot
cmdb_ci_dynamodb_table	
cmdb_ci_cloud_object_storage	
cmdb_ci_network	
cmdb_ci_cloud_function	
cmdb_ci_vm_instance	
cmdb_ci_kubernetes_cluster	

Supported CI class types for Microsoft Azure services

Supported CI class types for Microsoft Azure enable assigning cost and usage data correctly using the CI placement process. The CI placement process places a subset of CIs into corresponding CI tables that are used in the recommendation generation process for Cloud Cost Management.

Note: All the supported CI class types are placed after the Cumulus Unsupported CI Placement scheduled job runs daily. Some of the CI class types are placed immediately after Billing Download job execution.

Supported CI class types

All supported CI class types	CI class types that are placed immediately after job execution
cmdb_ci_instance_scale_set	cmdb_ci_vm_instance
cmdb_ci_vm_instance	cmdb_ci_cloud_database
cmdb_ci_cloud_database	cmdb_ci_database
cmdb_ci_kubernetes_cluster	cmdb_ci_storage_volume
cmdb_ci_cloud_load_balancer	cmdb_ci_storage_vol_snapshot
cmdb_ci_database	
cmdb_ci_network	
cmdb_ci_storage_vol_snapshot	
cmdb_ci_cloud_storage_account	
cmdb_ci_storage_volume	

Supported CI class types for Google Cloud services

Supported CI class types for Google Cloud enable assigning cost and usage data correctly using the CI placement process. Some CI class types are placed immediately. The CI

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

placement process places a subset of CIs into corresponding CI tables that are used in the recommendation generation process for Cloud Cost Management.

Note: All the supported CI class types are placed after the Cumulus Unsupported CI Placement scheduled job runs daily. Some of the CI class types are placed immediately after Billing Download job execution.

Supported CI class types

All supported CI class types	CI class types that are placed immediately after job execution
cmdb_ci_instance_scale_set	cmdb_ci_vm_instance
cmdb_ci_vm_instance	cmdb_ci_cloud_database
cmdb_ci_cloud_database	cmdb_ci_database
cmdb_ci_kubernetes_cluster	cmdb_ci_storage_volume
cmdb_ci_cloud_load_balancer	cmdb_ci_storage_vol_snapshot
cmdb_ci_database	
cmdb_ci_network	
cmdb_ci_storage_vol_snapshot	
cmdb_ci_cloud_storage_account	
cmdb_ci_storage_volume	

Asset Audit Response

The ServiceNow® Asset Audit Response application, which is part of ITAM for Financial Services, provides prescriptive workflows to manage and respond to your regulatory audits.

https://player.vimeo.com/video/1153031650?h=5625d582d3&badge=0&autopause=0&player_id=0&app_id=58479

Learn more about the Asset Audit Response application.

Get started

Explore	Configure	Engage
		
Learn the key features and business value that the Asset Audit Response application offers.	Configure the Asset Audit Response application to meet your specific needs.	Create and manage engagements for your financial regulatory audits.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Request	Fulfill	Reference
		
Request evidence for your financial regulatory audit engagements.	Fulfill evidence requests for your financial regulatory audit engagements.	View additional information about the Asset Audit Response application.

Exploring Asset Audit Response

Learn more about the Asset Audit Response application by reviewing the workflow and understanding the benefits that it can provide to your organization.

Asset Audit Response overview

The Asset Audit Response application provides an Asset Governance Workspace and an Audit Workspace where you can manage your financial regulatory audits, request evidence for these audits, respond to these requests through a guided experience, and access regulatory content data to help drive more efficient and accurate responses to these requests. With the Asset Audit Response application, you can plan for and resolve regulatory risks and compliance issues before they lead to audit failures.

Asset Audit Response users

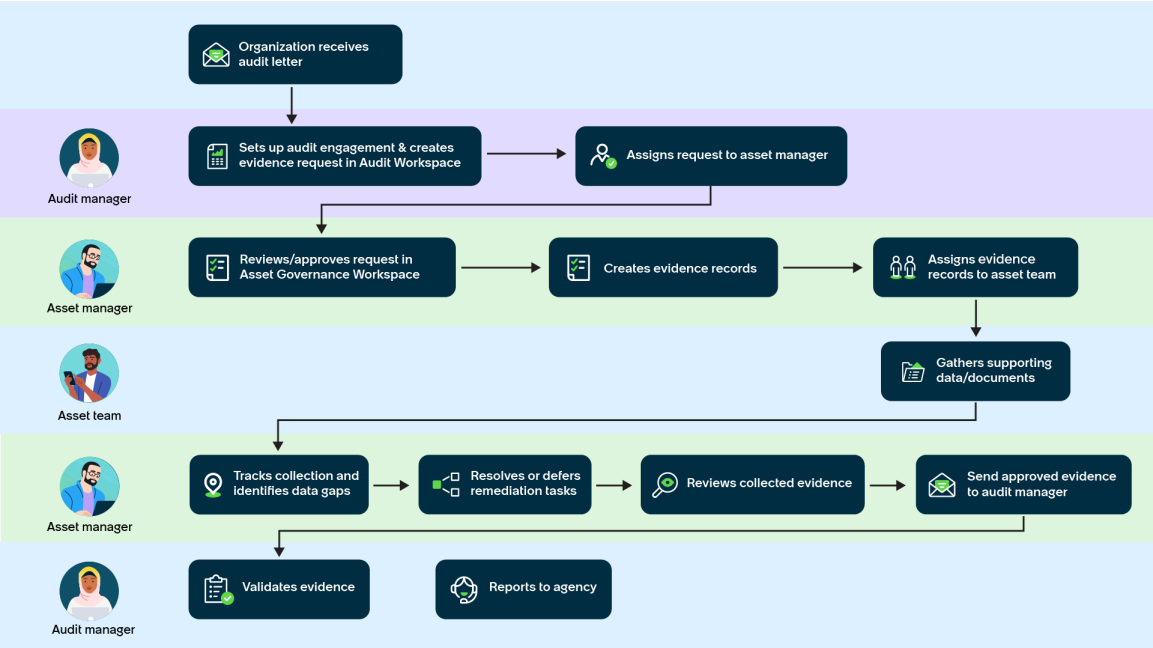
Users

User	Description
Audit managers	Audit managers oversee the auditing process within an organization. They can create, track, and manage audit engagements and evidence requests to assess their organization's compliance with laws, regulations, policies, or standards.
Asset managers	Asset managers oversee the end-to-end life cycle of each asset within an organization. They can fulfill evidence requests for audit engagements.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Audit Response workflow

The following section describes the steps that are involved in the Asset Audit Response workflow.



1. An organization receives an audit letter from a financial regulatory agency, such as the Federal Financial Institutions Examination Council (FFIEC).
2. In the Audit Workspace, the audit manager creates an engagement to scope, plan, and conduct the requested audit.
3. The audit manager then creates a corresponding evidence request to obtain supporting information and data that can help with completing the engagement.
4. The evidence request is assigned and submitted to the asset manager.
5. In the Asset Governance Workspace, the asset manager reviews and accepts the evidence request.
6. The asset manager then initiates the evidence collection process by creating the relevant evidence records and assigning them to the appropriate asset team members. Each evidence record corresponds with a set of supporting information or data that the asset manager wants to collect and submit for the evidence request.
7. The asset manager can also define remediation rules to identify data gaps that are discovered during the evidence collection process.
8. Each asset team member begins collecting evidence, as defined in their assigned evidence records.
9. While each asset team member is collecting evidence, the asset manager can track and monitor the progress of the evidence collection.
10. After the evidence is collected, remediation tasks are automatically generated based on the remediation rules that the asset manager defined. The asset manager can choose to resolve or defer the remediation tasks.
11. The asset manager reviews and approves the collected evidence.
12. The asset manager submits the approved evidence to the audit manager for final review.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

13. In the Audit Workspace, the audit manager reviews and accepts the submitted evidence.
14. The audit manager reports these findings to the financial regulatory agency to complete the audit engagement.

Asset Audit Response benefits

Asset Audit Response benefits

Benefit	Feature	User
Create and manage financial regulatory audit engagements and corresponding evidence requests.	Audit Workspace	Audit managers
Track and manage responses to evidence requests for your financial regulatory audits.	Asset Governance Workspace	Asset managers
Fulfill evidence requests for your financial regulatory audits.	Asset Response Guided Experience	Asset managers

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

What to explore next

To learn more about configuring and using Asset Audit Response, see:

- Configuring Asset Audit Response
- Managing engagements for financial regulatory audits
- Requesting evidence for financial regulatory audit engagements
- Fulfilling evidence requests for financial regulatory audit engagements
- Asset Audit Response reference

Asset Governance Workspace

If you are an asset manager, you can use the Asset Governance Workspace to get a comprehensive view of your assigned evidence requests and to track and manage your responses to those requests.

Asset Governance Workspace landscape

The Asset Governance Workspace is a unified medium with a single view. This view enables you to:

- Gain visibility into your assigned evidence requests.
- Fulfill, respond to, and track the progress of each request.
- Gain insight into important audit data, such as the due date and requirements of each request.
- Track and manage remediation tasks.

The Asset Governance Workspace contains the Asset governance overview.

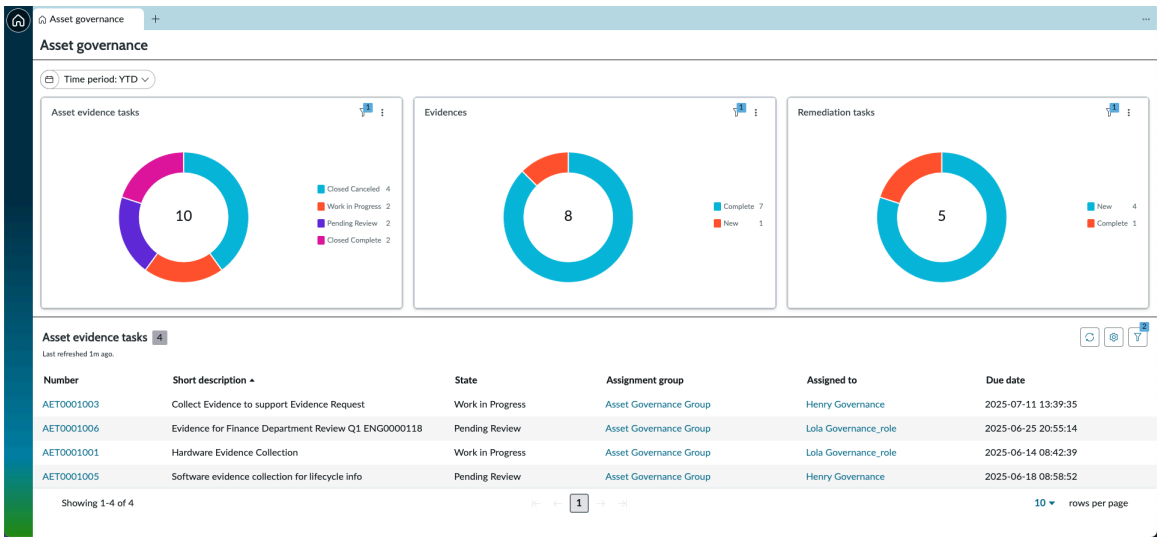
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset governance overview

Enhance your Asset Audit Response experience by using the modernized and user-friendly Asset governance overview. This simplified and intuitive overview helps you use the Asset Audit Response application more effectively by reducing complexity.

You can use the Asset governance overview to perform the following tasks:

- Fulfill, respond to, and track the progress of your assigned evidence requests.
- Track and manage remediation tasks.



Select any widget to view more detailed information or to perform a relevant task.

Overview dashboard

Widget	Description
Asset evidence tasks	Number of asset evidence tasks, grouped by the task state. Each asset evidence task corresponds with an evidence request that was assigned and submitted to you through the Lite Audit Workspace.
Evidence	Number of evidence records that you have created for all evidence requests, grouped by the record state.
Remediation tasks	Number of remediation tasks that are generated for all evidence requests, grouped by the task state.

Audit Workspace

If you are an audit manager, you can use the Audit Workspace to track and manage your financial regulatory audit engagements and corresponding evidence requests.

Audit Workspace landscape

The Audit Workspace is a unified medium with multiple views. These views enable you to create and manage engagements and evidence requests for your financial regulatory audits. They also help you gain insight into the overall audit timeline and status, monitor ongoing audit activity progress, and scope entities.

The Audit Workspace also supports repositories of financial regulatory requirements and guidelines from various organizations and frameworks, such as the Federal Financial Institutions Examination Council (FFIEC). You can align your evidence requests with these requirements and

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

guidelines to help your asset managers better understand the compliance obligations that are associated with each request.

Note: All requirements and guidelines that have been supported since before the Australia release are automatically included in the base Asset Audit Response application. Any requirements and guidelines that are supported starting with the Australia release are available only through the Unified Content Management application. You must install this application from the ServiceNow® Store as an add-on to the base Asset Audit Response application.

For more information on the Audit Workspace, see Audit Workspace limited.

AI in Asset Audit Response

Set up, manage, and optimize your generative AI solutions on the ServiceNow AI Platform® from a single workspace.

The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

For more information, see ServiceNow product tiers.

For more information about AI capabilities in Asset Audit Response, see Fulfill evidence requests through the Asset Response Guided Experience.

For information about AI assets that are available on the ServiceNow AI Platform, see the following topics:

- Generative AI skills
- Agentic workflows

Important:

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

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-

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

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 information about legal request and/or legal matter (including related field information, comments, and work notes). 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.

Configuring Asset Audit Response

Configure the Asset Audit Response application so that you can track and manage your financial regulatory audit engagements, evidence requests, and responses to those requests.

Configuration overview

Install Asset Audit Response

You can install the Asset Audit Response application (com.sn_audit_response) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Asset Audit Response application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Ensure that at least one of the following applications is already installed on your ServiceNow instance:
  - The ServiceNow® Software Asset Management application

    For instructions on how to install this application, see Request Software Asset Management.
  - The ServiceNow® Hardware Asset Management application

    For instructions on how to install this application, see Install Hardware Asset Management from the ServiceNow Store.

Role required: admin

About this task

The following items are installed with Asset Audit Response:

- Store applications
- Roles
- Tables

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information, see Installed with Asset Audit Response.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Asset Audit Response application (com.sn_audit_response) using the filter criteria and search bar.

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

   A list of the versions available to you 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. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Managing engagements for financial regulatory audits

If you are an audit manager, you can create and manage engagements for your financial regulatory audits in the Audit Workspace.

Overview of managing engagements for financial regulatory audits

Create and manage engagements for your financial regulatory audits by performing the following tasks:

- Create an audit engagement in Audit Workspace

  Create an engagement to manage audit information and to collect entities, controls, and control tests that are relevant to the audit.

- Create an activity in the Audit Workspace

  Create an activity that explores and provides documented evidence of whether the associated control is operating correctly or not.

Requesting evidence for financial regulatory audit engagements

If you are an audit manager, you can request evidence for your financial regulatory audit engagements in the Audit Workspace.

Overview of requesting evidence for financial regulatory audit engagements

Request evidence for your financial regulatory audit engagements by performing the following task:

Request evidence using Audit Workspace

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Request evidence at any stage of a financial regulatory audit by using the Audit Workspace.

Fulfilling evidence requests for financial regulatory audit engagements

If you are an asset manager, you can fulfill evidence requests for financial regulatory audit engagements in the Asset Governance Workspace.

Overview of fulfilling evidence requests

Fulfill evidence requests for financial regulatory audit engagements by performing the following task:

Fulfill evidence requests through the Asset Response Guided Experience

Use the Asset Response Guided Experience to fulfill and respond to evidence requests for your financial regulatory audit engagements.

Fulfill evidence requests through the Asset Response Guided Experience

Use the Asset Response Guided Experience to fulfill and respond to evidence requests for financial regulatory audit engagements.

Before you begin

Role required: sn_audit_response.asset_governance

About this task

The Asset Response Guided Experience takes you through the entire process of fulfilling an evidence request, from accepting the request to submitting a final response to the request. Each set of tasks in this process is represented by a step in the guided experience. You must complete all tasks within a step before you can move on to the next step. You can also save your progress at any point in the process and return to the guided experience at a later time.

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

Procedure

1. Navigate to **Workspaces** > **Asset Governance Workspace**.
2. From the Asset evidence tasks related list in the Asset governance overview, select the task that is associated with the evidence request that you want to fulfill.
   The Asset Response Guided Experience opens.
3. In the Audit scope step of the guided experience, verify the details of the evidence request and then select **Accept**.

   Note: At any point in the Audit scope step, you can post comments and view your activity stream in the contextual side panel.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

At any point after you select **Accept**, you can automatically generate a comprehensive summary of the evidence request by selecting **Summarize evidence**. This summarization skill uses generative AI to provide the following information about the request:

- Evidence Request Overview: General information about the request, including the purpose of the request, the date and time at which the request was created, the user who the request is assigned to, and details about the corresponding audit engagement.
- Evidence Records: Information about the evidence records that were created for the request, including the total number of records, the type of supporting information that is included in each record, and the state of each record.
- Remediation Rules: Information about the remediation rules that were created for the request, including the total number of rules and the focus of each rule.
- Remediation Tasks: Information about the remediation tasks that were automatically generated based on the remediation rules, including the total number of tasks and the status of each task.
- Activity & Audit Notes: Additional notes and activity logs for the request.

This skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default. If you choose to deactivate the skill, you must reactivate it manually. For detailed instructions, see Activate an AI skill.

4. Create evidence records for the supporting information or data that you want to collect and submit for the evidence request.

   a. In the side panel of the guided experience, select **Asset Evidence**.

   b. From the Asset Evidence related list, select **New**.

   c. On the form, fill in the fields.

Create New Asset Evidence form

Field	Description
Status	Status of the evidence collection.
Evidence type	Type of evidence that you want to collect and submit. Select one of the following options: ▪ **Attachment**: Document that contains supporting information or data. **Important:** If you select this option, you must use the **Attachment** option in the contextual side panel of the Create New Asset Evidence form to attach the document. ▪ **Data Visualization**: Internal report that contains supporting information or data. ▪ **Report**: Internal report that contains supporting information or data. ▪ **URL**: URL for the website or shared online folder that contains supporting information or data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Assignment group	User group that is assigned to collect the evidence.
Assigned to	User who is assigned to collect the evidence.
Short description	Brief description of the evidence that you want to collect and submit.
Description	Detailed description of the evidence that you want to collect and submit.
Report	Report that contains the supporting information or data that you want to collect and submit. If you use this option, the user who is assigned to this evidence record must run the selected report to collect the information or data. **Note:** This field appears only if you set the **Evidence type** field to **Report**.
Data Visualization	Data visualization report that contains the supporting information or data that you want to collect and submit. If you use this option, the user who is assigned to this evidence record must run the selected report to collect the information or data. **Note:** This field appears only if you set the **Evidence type** field to **Data Visualization**.
URL	URL of the website or shared online folder that contains the supporting information or data that you want to collect and submit. The assigned user must collect this information or data from the website or shared online folder that you specify. **Note:** This field appears only if you set the **Evidence type** field to **URL**.

d. Select **Save**.
The form closes and you're automatically redirected to the new evidence record. The record is added to the Asset Evidence related list.

e. Repeat steps b to d for each evidence record that you want to create.

The assigned user can begin collecting the required evidence. After the evidence is collected, the user can upload it by using the **Attachment** option in the contextual side panel of the evidence record. After the evidence is successfully uploaded, the user can update the **Status** field to **Complete**.

Note: If an evidence record has an Evidence type of Report or Data Visualization, the assigned user can view the associated report by selecting **View Report** on the evidence record header. The complete detailed report opens in a new browser tab, providing comprehensive insight into the supporting information or data that you want to collect and submit.

5. **Optional:** Create remediation rules to identify any data gaps that are discovered during the evidence collection process.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In the side panel of the guided experience, select **Evidence Remediation Rules**.

b. From the Evidence Remediation Rules related list, select **New**.

c. On the form, fill in the fields.

Create New Evidence Remediation Rule form

Field	Description
Asset evidence	Evidence record that the remediation rule applies to.
Resolution	Action that must be taken to resolve and close any remediation tasks that are automatically generated from the remediation rule.
Assignment group	User group that is assigned to manage the remediation tasks that are automatically generated from the remediation rule.
Assigned to	User who is assigned to manage the remediation tasks that are automatically generated from the remediation rule.
Short description	Brief description of the remediation rule.
Description	Detailed description of the remediation rule.
Evidence scope	Table that the remediation rule applies to. For example, if you set this field to **Computer**, the remediation rule applies only to the computer records that are defined in the **Scope filter** field.
Scope filter	Conditions that enable you to filter the evidence scope that the remediation rule applies to. Select **Set conditions** to specify the field, operator, and value of each condition that you want to set.
Scope condition	Conditions for creating remediation tasks based on the evidence scope and scope filter of the remediation rule. Select **Set conditions** to specify the field, operator, and value of each condition that you want to set.

6. On the header of the Asset Response Guided Experience, select **Next**.
7. In the Readiness step of the guided experience, monitor the status of your evidence collection by using the following widgets and related lists:

Readiness widgets and related lists

Widget or related list	Description
Task analytics by priority	Total number of remediation tasks that were automatically generated from your remediation rules, grouped by the task priority.
Total assets evaluated	Total amount of evidence that has been evaluated through your remediation rules, grouped by the compliance status.
Evidences	List of evidence records that you have created for the evidence request. Select a record to view additional details.
Remediation tasks	List of remediation tasks that were automatically generated from your remediation rules. Select a task to view additional details, including the list of

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Widget or related list	Description
	impacted records that are associated with that task. Use this information to determine if you want to defer or take action on that task.

8. On the header of the Asset Response Guided Experience, select **Next**.
9. In the Remediation step of the guided experience, review your remediation tasks by using the following widgets and related lists:

Remediation widgets and related lists

Widget or related list	Description
Task analytics by priority	Total number of remediation tasks that were automatically generated from your remediation rules, grouped by the task priority.
Task burndown	Burndown chart that enables you track the progress of your outstanding remediation tasks against the estimated timeline of completion.
Remediation tasks	List of remediation tasks that were automatically generated from your remediation rules. Select a task to view additional details, including the list of impacted records that are associated with that task. Use this information to determine if you want to defer or take action on that task.

10. On the header of the Asset Response Guided Experience, select **Next**.
11. In the Review step of the guided experience, review and approve all evidence that has been collected for the evidence request.
    Select each record in the Evidence related list to review the evidence that has been collected and uploaded by the assigned user. You can also verify other important details, such as the status of the evidence collection.

    Important: All evidence collection must be completed before you approve the evidence.

    You can also review your remediation tasks by using the Task analytics by priority and Remediation task by status widgets.
12. After all evidence is successfully collected and approved, select **Submit for review**.
    The collected evidence is submitted to the audit manager for final review. Based on the results of the review, the audit manager can choose to accept, cancel, request a revision, or request additional information for the associated evidence request.

Asset Audit Response reference

Reference topics provide additional information about the Asset Audit Response application.

Installed with Asset Audit Response

Various components are installed on activation of the Asset Audit Response application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Store applications installed

Store application	Description
Asset Audit Response (com.sn_audit_response)	Provides capabilities to track and manage financial regulatory audit engagements, evidence requests, and the responses to those requests.
GRC: Advanced Core (com.sn_grc_advanced)	Provides common functionality to support forward-looking use cases across GRC applications such as Risk, Policy & Compliance, and Audit. Includes capabilities to manage issue triage workflows and evidence collection.
GRC: Policy and Compliance Management (com.sn_compliance)	Provides capabilities to create and manage policies, standards, and internal control procedures cross-mapped to external regulations. Also provides structured workflows for identifying, assessing, and monitoring control activities.
GRC: Audit Management Workspace (com.sn_audit_workspace)	Provides a single-pane view where audit supervisors and auditors can view the overall audit timeline and status, track budget and resources for engagements, track high-priority observations and issues, and monitor ongoing control testing and audit task progress. Auditors can also test the effectiveness of controls, request evidence, create observations, and complete other audit activities.
IRM Feature Role (com.sn_grc_ftr_role)	Provides access controls to regulate the Governance, Risk, and Compliance (GRC) data and capabilities that users can view or use.
GRC: Financial Services Controls Accelerator (com.sn_finserv_cntrl)	Provides cybersecurity and technology controls for the financial services industry.

Roles installed

Role	Description	Contains roles
Asset governance [sn_audit_response.asset_governance]	This role can fulfill and respond to evidence requests.	• sn_grc_advanced.evidence_responder • sam_user (available only if you have installed the Software Asset Management application on your ServiceNow instance) • sn_hamp.ham_user (available only if you have installed the Hardware Asset Management application on your ServiceNow instance) • asset (available only if you have installed the Hardware Asset Management application on your ServiceNow instance)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role	Description	Contains roles
Asset audit manager [sn_audit_response.grc_asset_audit_manager]	This role can create audit engagements, activities, evidence requests, and entity scopes.	• sn_audit.shared_manager • sn_grc_advanced.evidence_requester

Tables installed

Table	Description
Asset Evidence [amg_asset_evidence]	List of evidence records that you have created for all evidence requests.
Asset Evidence Task [amg_asset_evidence_task]	List of asset evidence tasks.
Evidence Remediation Rule [amg_evidence_remediation_rule]	List of remediation rules that you have created for your evidence records.
Evidence Remediation Task [amg_evidence_remediation_task]	List of remediation tasks that are generated for all evidence requests.

Domain separation and Asset Audit Response

Domain separation is supported for Asset Audit Response. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview

Asset Audit Response supports domain-based data separation. This domain separation is available across all Asset Audit Response features and tables.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

How domain separation works in Asset Audit Response

Domain separation in Asset Audit Response does not require any additional setup or configuration.

When managing and completing an audit engagement and corresponding evidence request, ensure that you are using data from the same domain across the Audit Workspace, the Asset Governance Workspace, and either the Software Asset Management or Hardware Asset Management application.

Note: If you create an evidence request under a specific domain in the Audit Workspace, the corresponding asset evidence task automatically falls under the same domain in the Asset Governance Workspace.

Related topics

Domain separation for service providers

IT Asset Management content request process

The IT Asset Management Content Service team manages and supports content requests from IT Asset Management customers.

The IT Asset Management Content team reviews content requests and delivers them through the regular bi-weekly content updates.

Examples of content requests include but are not limited to the addition of or update to Publishers, Products, Publisher Part Numbers, Discovery Maps and Lifecycle Dates. While you have the ability to add Custom Data (Publishers, Products, etc.) to your instance, it is recommended that you leverage out-of-box content for ITAM use cases. If you were to create custom data that has since been delivered through the Content Service, references should be updated to the out of box content, and custom data should be deleted.

Content requests fall into the following categories:

- New content: you require content that is not currently in the Content Library. You can request new content by submitting a catalog request through the Now Support portal
- Content correction: you require previously delivered content to be corrected. You can request content update by filing a case with ServiceNow Customer Support through the Now Support portal.

For more details on content requests, see this Knowledge base article on the ServiceNow Now Support https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB0790305.

Create IT Asset Management content request

Create request for new content via the Service Catalog application for the IT Asset Management content service.

Before you begin

Content request can be made for the Software Asset Management content service and the Hardware Asset Management content service.

Role required: customer user or partner user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Login to the ServiceNow Now Support portal.
2. Navigate to **Automation Store** > **Service Catalog**.
3. Search and select the catalog item **Asset Management Content Request**.
   On the Catalog Item form, the **Catalog Request number (CR)**, **Requested by**, and the **Company** fields populate automatically.
4. Fill in the details on the form.

Field	Description
Title	Summary of your request.
Description	Details of your request.
Selected instance	Instance you are requesting the content for.
Watch list	Add individuals within your organisation to view the progress of this request.
Content category	The content category for your request. You can select the Software Asset Management content service or the Hardware Asset Management content service.
Attachment	Attach an excel sheet with the needed information about the content requested.

5. Click **Submit**.
6. You can view your current content requests by navigating to **Automation Store** > **Service Catalog** > **My Content Requests**
   The default filter only shows your active requests. If you want to see all your requests (including closed ones), you need to adjust the filter.

Enterprise Asset Management

Enterprise Asset Management is a business application that manages the entire life cycle of your enterprise connected and non connected assets.

The Enterprise Asset Management application provides a comprehensive and end to end solution for maintaining your assets, minimizing costly downtime, and maximizing the asset usable life.

For additional information on the Enterprise Asset Management application, you can listen to the ServiceNow Insights Podcasts in the ServiceNow Community.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Get started

Explore



Learn the key features and business value that the Enterprise Asset Management application offers.

Configure



Configure the Enterprise Asset Management application to meet your specific needs.

Manage



Create and manage your enterprise models and assets.

Procure



Create and manage your enterprise asset inventory and contracts.

Dispatch



Create and manage work orders for enterprise assets.

Workflows



Use the Service Catalog application to create catalog requests for workflows.

Mobile experiences



Use the Mobile application to create and manage enterprise assets and asset tasks.

Acquire



Use the Procurement application to source and receive requested enterprise assets.

Reference



Get details about roles, field descriptions, domain separation, and terminology.

Troubleshoot and get help

- Ask questions and explore other resources for Enterprise Asset Management in the ServiceNow community
- Contact Customer Service and Support

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Exploring Enterprise Asset Management

Use the Enterprise Asset Management application to optimize the quality and performance of assets by reducing downtime, increasing asset utilization, and extending asset lifespan while reducing operating costs for asset-intensive organizations.

Enterprise Asset Management overview

The Enterprise Asset Management application automates the full life cycle of your physical business assets with prescriptive workflows. With the Enterprise Asset Management application, you can maximize the return on your enterprise assets, control capital, and optimize operating costs. You can also reduce risk by tracking and managing your assets from planning to disposal.

Enterprise Asset Management users

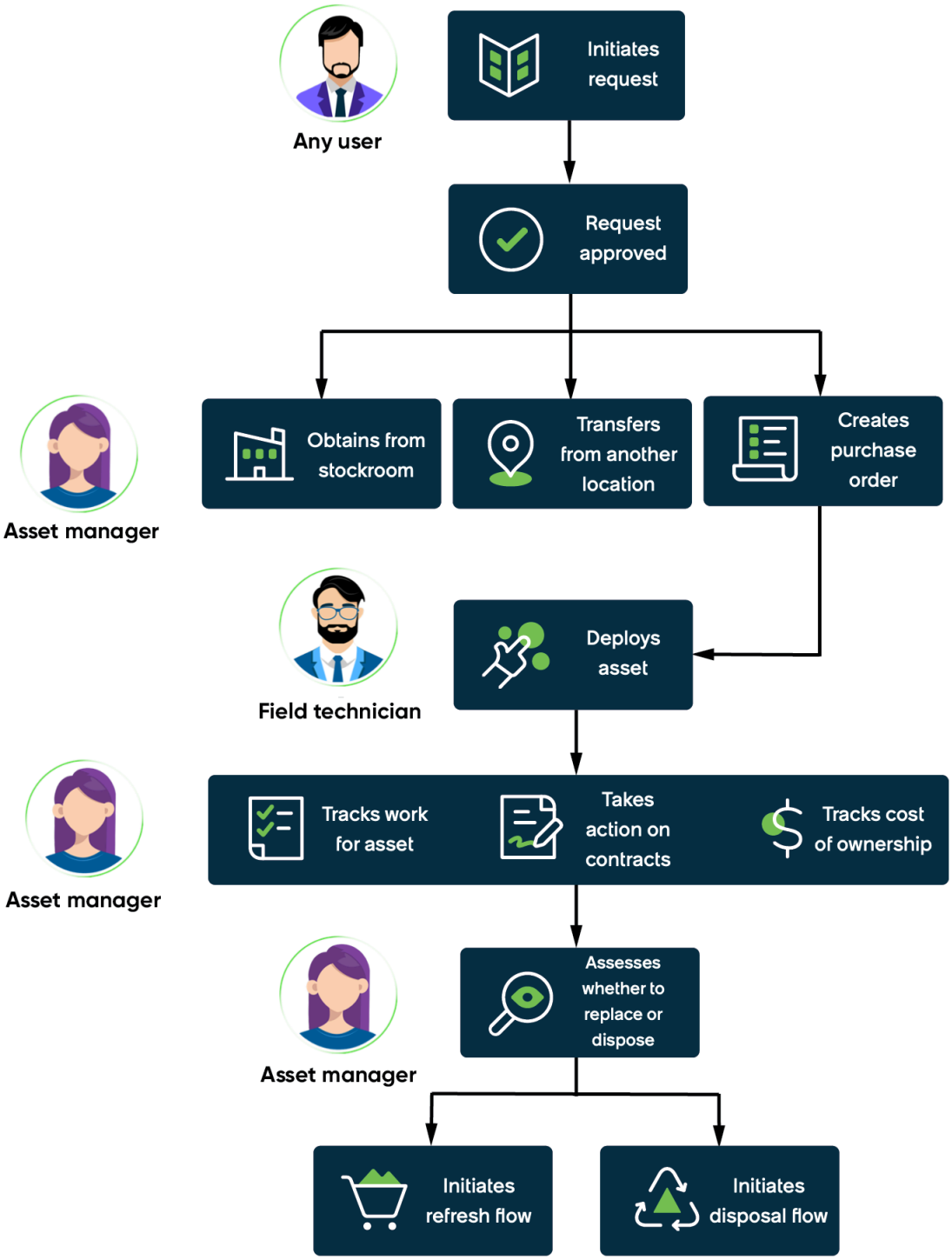
User	Description
Enterprise administrators	Work involves planning strategic initiatives, managing capital planning, and optimizing asset returns.
Enterprise asset managers	Work involves decreasing downtime, extending asset life, and rationalizing inventory.
Enterprise technicians	Work involves increasing productivity and improving response time.
Medical asset managers	Similar to the tasks carried out by an enterprise asset manager, though specifically within the healthcare sector.
Medical technicians	Similar to the tasks carried out by an enterprise asset technician, though specifically within the healthcare sector.
Facility asset manager	Similar to the tasks carried out by an enterprise asset manager, though specifically within the facility management sector.
Facility technician	Similar to the tasks carried out by an enterprise asset technician, though specifically within the facility management sector.
Operational technology asset manager	Similar to the tasks carried out by an enterprise asset manager, though specifically within the operational technology sector.
Operational technology asset technician	Similar to the tasks carried out by an enterprise asset technician, though specifically within the operational technology sector.

Enterprise Asset Management workflow

The following illustration describes the tasks involved in the Enterprise Asset Management workflow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow depicting different users using the Enterprise Asset Management



1. A user in any role initiates a request for an asset using the Service Catalog application
2. The request is created and sent for approval.
3. Following approval, the asset manager begins the process of sourcing the requested asset.
4. The asset manager evaluates whether to source the asset locally from a stockroom, transfer it from another location, or create a new purchase order.
5. The asset manager decides to create a new purchase order to source the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Upon receipt of the purchase order, the field technician deploys the asset.
7. The asset manager uses work order and work order tasks to track and manage work for the asset.
8. Additionally, the asset manager can create contracts for the asset and manage by taking actions on contracts that are nearing expiration or already expired.
9. The asset manager can also track the total cost of ownership for the asset.
10. As the asset approaches the end of its useful life, the asset manager assesses whether to replace or dispose of the asset.
11. Based on the decision, the asset manager initiates either a refresh flow or a disposal flow for the asset.

Enterprise Asset Management benefits

Benefit	Feature	Users
Get visibility into all aspects of your assets such as dashboards, asset count by model, lifecycle state, model category, and the overall performance of assets.	Enterprise Asset Workspace	• Enterprise administrator • Enterprise asset manager
Use your own customized workspace for medical and facility industries.	Configurable workspaces	• Medical asset manager (for the Medical Asset Workspace) • Medical asset technician (for the Medical Asset Workspace) • Facility asset manager (for the Facility Asset Workspace) • Facility asset technician (for the Facility Asset Workspace) • Enterprise administrator • System administrator
Maximize asset value with comprehensive cost analysis of owning and managing assets.	Total Cost of Ownership (TCO) for enterprise assets	Enterprise asset manager
Track, manage, and maintain discrete enterprise and linear assets.	Linear assets in Enterprise Asset Management	Enterprise asset manager
Onboard single and multiple assets using playbooks.	Create an asset onboarding process	Enterprise asset manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Benefit	Feature	Users
Simplify enterprise asset offboarding process using a reclamation workflow.	Enterprise asset reclamation	Enterprise asset manager
Rate assets by risk level and generate color-coded heatmaps.	Risk scores	Enterprise administrator
Track and manage work for your enterprise assets by using work orders.	Managing work orders for your enterprise assets	Enterprise asset manager
Create and manage enterprise asset contracts.	Create and manage contracts for enterprise assets	• Enterprise administrator • Enterprise asset manager
Get defective enterprise assets in a stockroom repaired quickly using the Repair flow.	Repair flow	Enterprise asset manager
Locate and pick the assets in your stockroom efficiently by using the ServiceNow Mobile Agent application.	Inventory picking	Inventory user
Track asset movement from the receiving bay of the inventory to the designated space within the stockroom using the Asset put away task.	Asset put away	Inventory user
Return assets that are in your personal stockroom easily by creating Drop off tasks.	Drop off tasks	• Enterprise asset technician • Enterprise asset manager
Receive enterprise and consumable assets at stockrooms from any workflow at a centralized location	Receiving enterprise and consumables assets at stockrooms	Asset managers/ Inventory users
Assess how effectively and efficiently assets fulfill their intended functions within your organization using the Asset performance reports.	Asset performance reports	Asset managers
Track and manage stockrooms efficiently by evaluating the inventory reports.	Inventory reports	Inventory users
Enhance maintenance efficiency with standardized and predefined failure and resolution codes.	Failure and resolution codes	Enterprise administrators/ Inventory administrators/ Inventory users/Enterprise asset technicians

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to explore next

To learn more about configuring and using the Enterprise Asset Management application, see the following topics:

- Configuring Enterprise Asset Management
- Managing enterprise models and assets
- Managing enterprise asset inventory and contracts
- Managing work orders for your enterprise assets
- Using Service Catalog for Enterprise Asset Management requests and flows
- Managing enterprise assets and tasks using the Mobile Agent application
- Procuring enterprise assets
- Enterprise Asset Management reference
- Industry-specific Enterprise Asset Management solutions

Enterprise Asset Workspace

Use the Enterprise Asset Workspace to get a comprehensive view of all your assets and manage them efficiently.

Enterprise Asset Workspace landscape

The Enterprise Asset Workspace is a unified medium with multiple views. The views give you visibility into all your assets, models, stockroom and stockroom types. You can also create multiple workflows such as transfer orders, disposal orders, and also provides access to analytics via dashboards.

Note: Include the *`Enterprise Asset Classes`* and *`Enterprise Model Classes`* properties from the Asset Properties table in update sets whenever you move any changes from one environment to another. For details on update sets, see Update Sets transfer.

You can navigate to the Enterprise Asset Workspace in the following two ways:

- If the Next Experience UI Framework is turned on your instance: Select **Workspaces** and then select **Enterprise Asset Workspace**.
- If the Next Experience UI Framework is turned off on your instance: On the left navigation bar, enter `Enterprise Asset Workspace`. Select to open the Enterprise Asset Workspace menu in a new tab.

The Enterprise Asset Workspace contains the following views:

- Enterprise asset overview for Enterprise Asset Workspace
- Asset analytics overview for Enterprise Asset workspace
- Inventory overview for Enterprise Asset Workspace
- Enterprise asset estate overview for Enterprise Asset Workspace
- Enterprise model management overview for Enterprise Asset Workspace
- Normalization overview for Enterprise Asset Management
- Contract and lease management overview for Enterprise Asset Workspace

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inline editing

Ensure that you enable Inline editing in your ServiceNow instance to directly make changes to fields instead of opening the record and changing the field on the form.

Note: Once you enable inline editing in your ServiceNow instance, it is enabled for all ServiceNow applications.

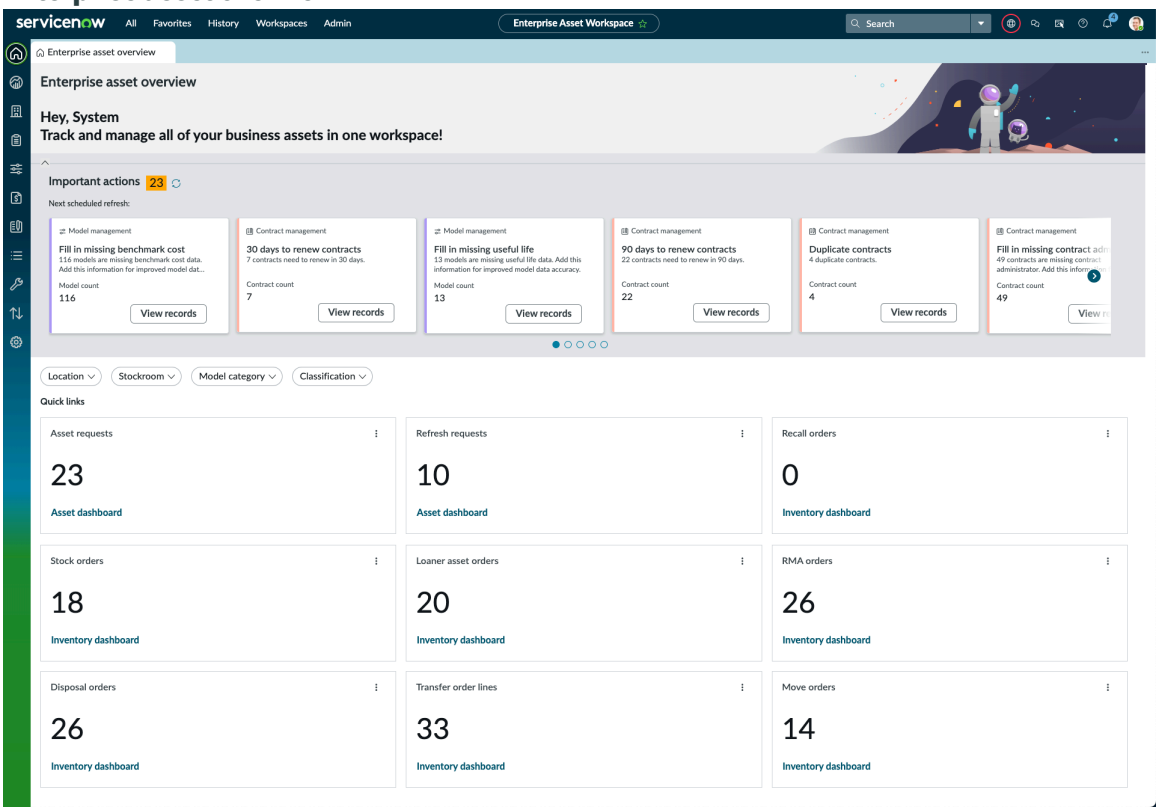
Enterprise asset overview for Enterprise Asset Workspace

Use the Enterprise asset overview as the landing page for the Enterprise Asset Workspace to get insights into key metrics.

Use the Enterprise asset overview dashboard to perform the following tasks:

- Identify and attend to critical action items that require your immediate attention such as entering missing manufacture data, model number, or asset tag information.
- Search for and track asset requests, transfer orders, stock orders, asset refresh requests, disposal orders, and Return Merchandise Authorization (RMA) orders.

Enterprise asset overview



To access detailed information and take relevant action, select the relevant widget. You can also narrow down your results by using the **Location**, **Stockroom**, **Model category**, and **Classification** filters. For detailed information on the Classification filter, see Model classification.

Quick links on the dashboard

Widget	Description
Asset requests	Number of requested items where the item's model is a consumable or an enterprise model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Quick links on the dashboard (continued)

Widget	Description
Transfer order lines	Number of active transfer order lines.
Stock orders	Number of requested inventory stock order items.
Refresh requests	Number of open assets refresh order requests.
Recall orders	Number of open recall orders.
Disposal orders	Number of open disposal orders.
Loaner asset orders	Number of requested loaner asset orders.
RMA orders	Number of open Return Merchandise Authorization (RMA) orders.

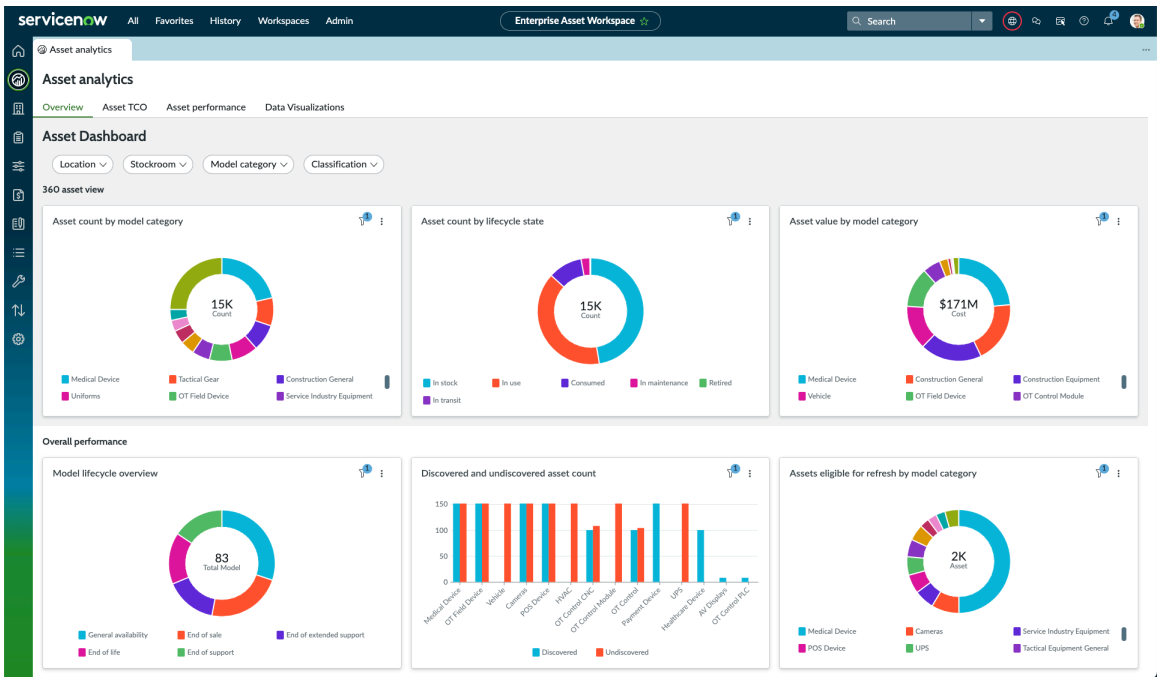
Asset analytics overview for Enterprise Asset workspace

Use the Asset Analytics view to get a detailed view of all your assets, their overall performance, and the asset total cost of ownership (TCO).

Enterprise Asset Dashboard

Use the Enterprise Asset Dashboard to get comprehensive information on all your enterprise assets.

You can filter the data based on location, stockroom, model category, and classification.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

360 asset view

Widget	Description
Asset count by model category	Number of assets grouped by the model category such as Medical General, Medical Diagnostic.
Asset count by lifecycle state	Number of assets grouped by the lifecycle state such as Retired, In use, and In stock.
Asset value by model category	Cost of assets grouped by the model category such as Vehicle, Cameras, and Field Devices.

Overall performance

Widget	Description
Model lifecycle overview	Overview of the model lifecycle grouped by the lifecycle phase such as **General Availability**, **End of Life**, **End of Support**, and **End of Sale**.
Discovered and undiscovered asset count	Comparison of the number of discovered and undiscovered assets grouped by model category.
Assets available for refresh by model category	Number of assets that have already expired or the current day is the expiry date, and are eligible for a refresh.

Asset TCO

This tab provides a detailed view of the TCO and displays key metrics that show the real-time status of assets regarding TCO benchmarks.

You can create new comparative reports and view existing ones.

You can filter the data based on location, stockroom, model category, and classification.

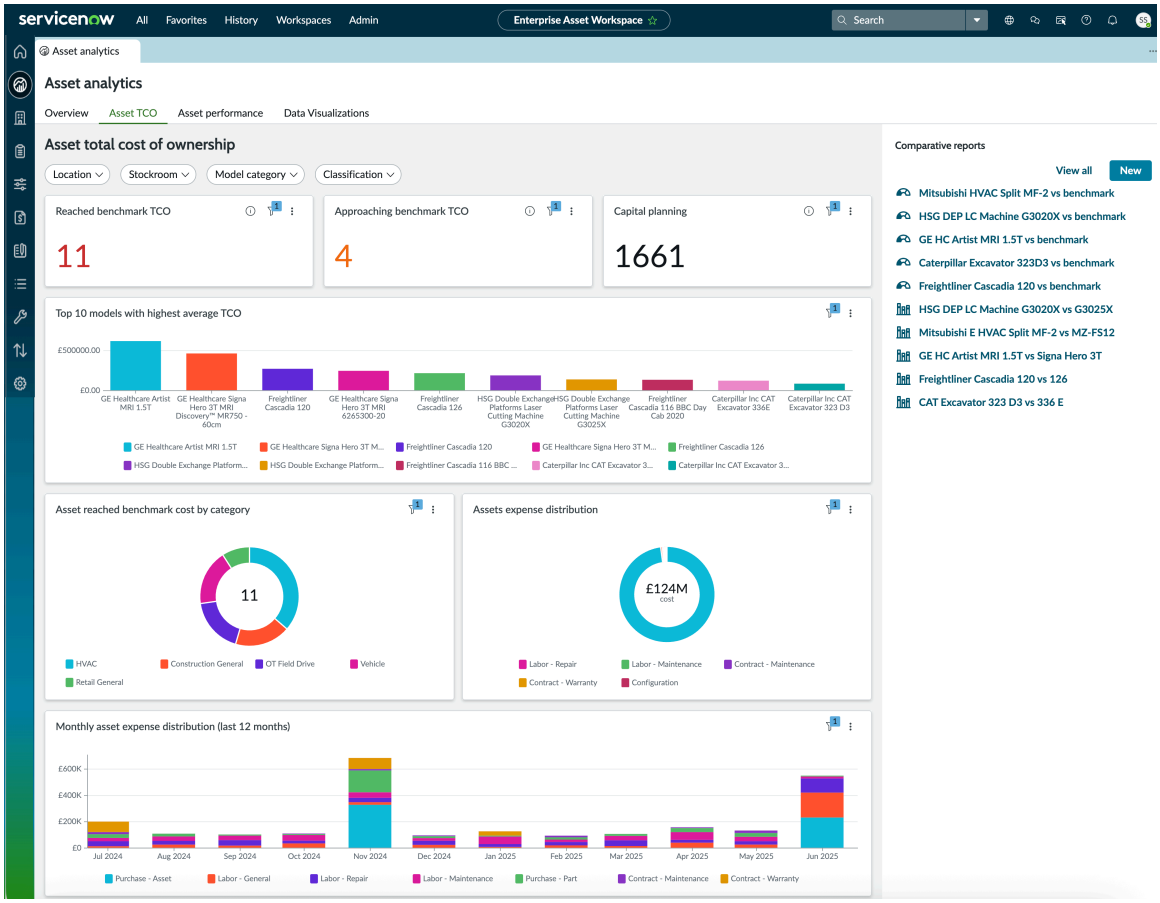
Select **View all** to view a list of all the comparative reports. Only reports that have at least one active report source are displayed with the exception of an offline report (where the cost type is either **Actual TCO** or **Projected TCO**). To update data sources on an offline report, open the report and select **Run update job**. This button only appears on an offline report. Once this job is complete, the latest collection date gets updated.

Note: Offline reports will not appear in the list of comparative reports until the latest collection date is populated.

You can select **New** to create a TCO report.

Select a report icon to directly open a report or select the report name to open the report form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Widget	Description
Reached benchmark TCO	Number of assets that reached the benchmark TCO.
Approaching benchmark TCO	Number of assets that are approaching the benchmark TCO
Capital planning	Number of assets for capital planning. The Assets for capital planning are assets that are not retired and their current life cycle phase is true.
Top 10 models with highest average TCO	A bar chart showing the top 10 models with the highest average TCO.
Assets reached benchmark cost by category	Number of assets by category that reached the benchmark cost.
Assets expense distribution	The asset expense distribution based on the following cost types: • Purchase - Asset • Purchase - Part • Configuration • Software • Contract - Lease • Contract - Warranty

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Widget	Description
	• Contract - Maintenance • Contract - Service • Contract - Other • Utilities • Shipment • Labor - Maintenance • Labor - Repair • Labor - General • Resold value
Monthly asset expense distribution (last 12 months)	Distribution of assets over the last 12 months, based on the following cost types: • Purchase - Asset • Purchase - Part • Configuration • Software • Contract - Lease • Contract - Warranty • Contract - Maintenance • Contract - Service • Contract - Other • Utilities • Shipment • Labor - Maintenance • Labor - Repair • Labor - General • Resold value

Asset performance

The Asset performance tab provides details on the average values of the following key performance indicators (KPIs):

- Availability
- Mean time between failures (MTBF)
- Mean time to repair (MTTR)

Note: For more details on calculation of KPIs, see Asset performance reports in the Enterprise Asset Workspace.

By default, the **Model category** filter is applied to the KPI reports. To further narrow down and focus on specific data, you can also select any one of the following filters:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

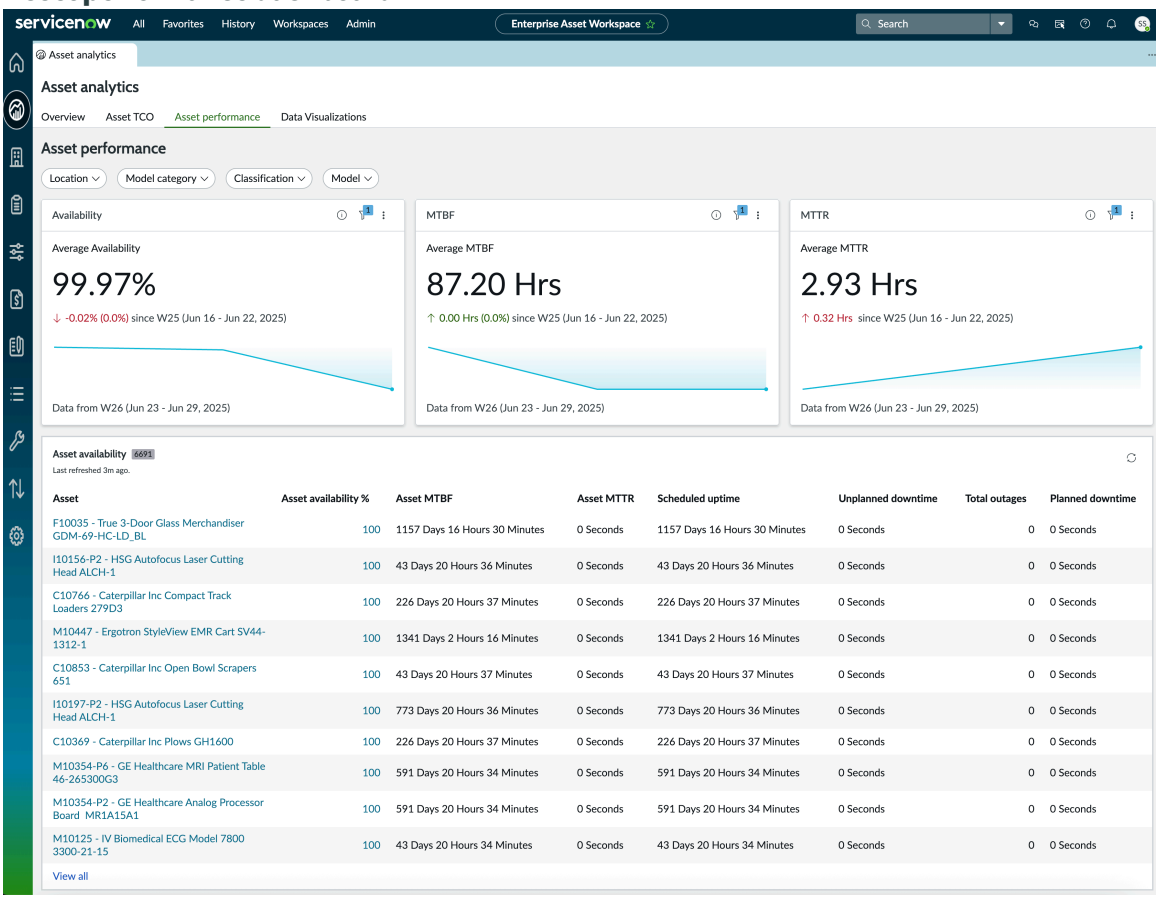
- **Domain**
- **Location**
- **Classification**
- **Model**

Note: You can apply a maximum of two filters to any KPI report.

You can see a weekly trend of the average KPI values in the report. The Asset Availability list provides KPI details for all enterprise assets that are tracked. The average KPI values are calculated based on the assets in this list.

When you select any KPI report, the **KPI Details** page appears. This page enables you to explore the information within that KPI. You can set targets you want to achieve and also set signals to notify you of any significant changes in the KPI.

Asset performance dashboard



Widget	Description
Availability	Average availability percentage of all enterprise assets that are tracked, calculated by dividing the total asset availability percentage by the number of assets listed in the Asset availability report.
MTBF	Average MTBF of all enterprise assets that are tracked, calculated by dividing the total Asset MTBF by the number of assets listed in the Asset availability report.
MTTR	Average MTTR of all enterprise assets that are tracked, calculated by dividing the total Asset MTTR by the number of assets listed in the Asset availability report.

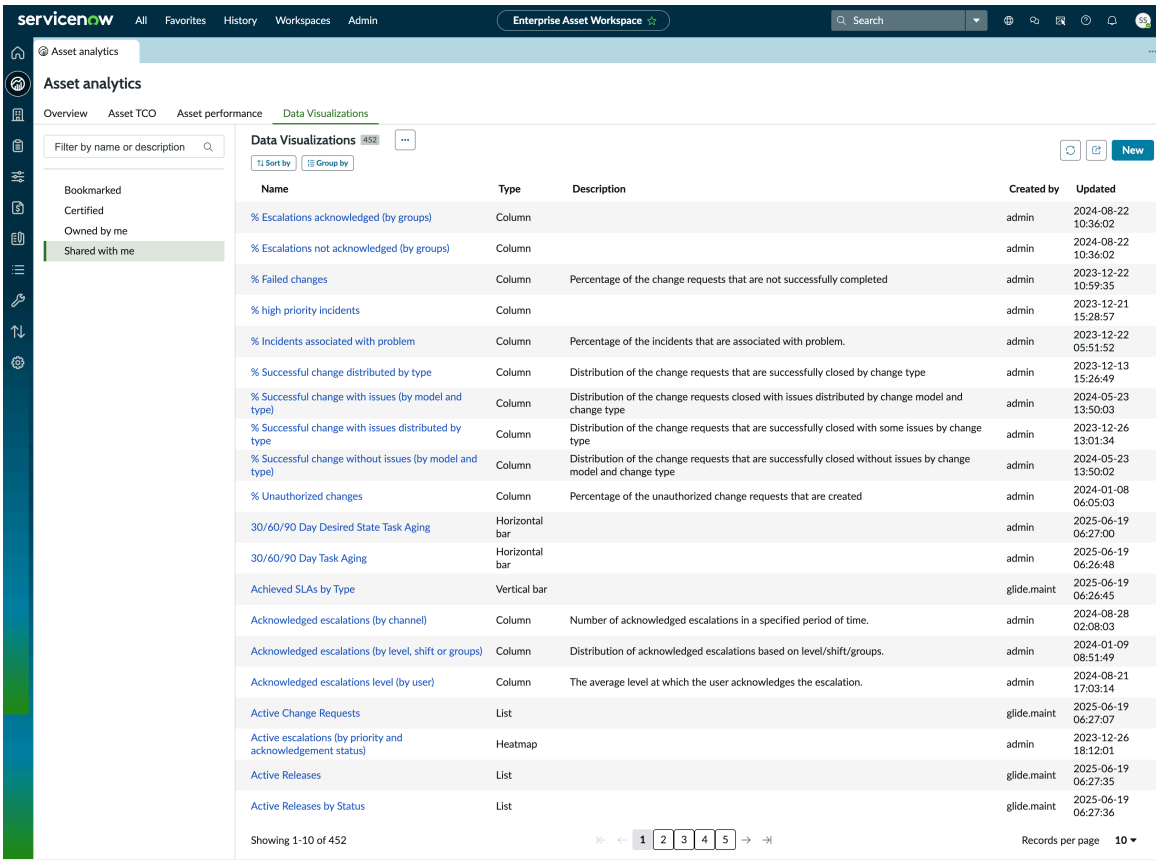
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Widget	Description
Asset availability	Report that lists the availability and other related KPIs of all enterprise assets that are tracked.

Data Visualizations

The Data Visualizations tab enables the asset managers to view and create data visualizations in the Visualization Designer. As an asset manager, you can view the visualizations that are bookmarked, certified, owned by you, and shared with you. You can only edit the visualizations that you created.

Data Visualizations tab



Inventory overview for Enterprise Asset Workspace

Use the Inventory view in the Enterprise Asset Workspace to optimize inventory thresholds and automate re-order process. You can create workflows and view detailed information on your inventory.

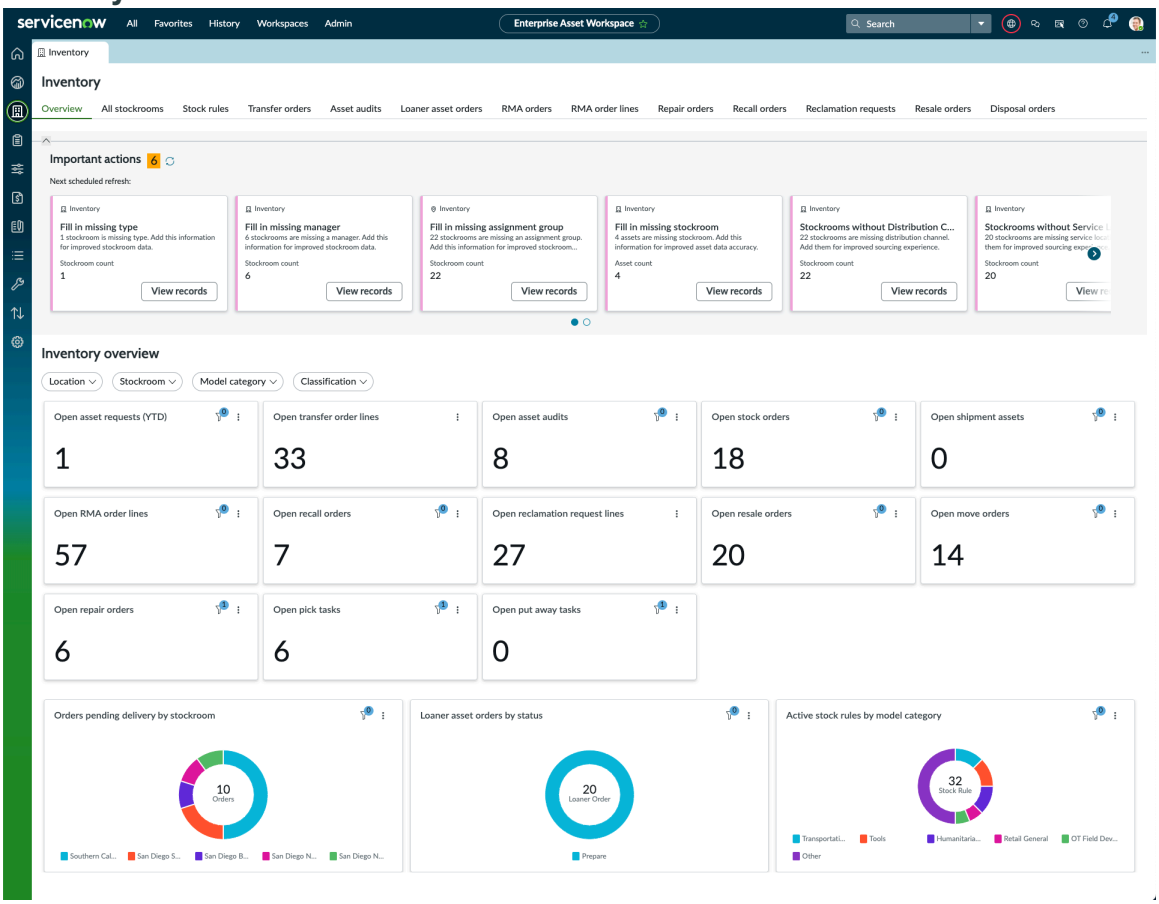
Take care of any urgent inventory related action items such as entering a missing stockroom type or stockroom name.

You can access the Inventory view by navigating to **Enterprise Asset Workspace** > **Inventory**.

To access detailed information and take relevant action, select any widget. You can also narrow your results by using the **Location**, **Stockroom**, and **Model category** filters.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inventory view



Use the following tabs to view your inventory:

- **Overview**: Get a glimpse of all your inventory data such as open transfer order lines, open asset audits, and loaner asset orders by status.
- **All stockrooms**: Create new stockroom and view stockrooms where your inventory is stored.
- **Stockroom types**: Create new storeroom types and view the various types of storerooms available for your inventory.
- **Stock rules**: Create new stock rules and view a list of existing stock rules.
- **Asset audits**: Create new asset audit records and view existing ones.
- **Disposal orders**: Create disposal order workflows for assets that have reached their end of life cycle or are no longer functional.
- **Loaner asset orders**: View all loaner asset orders and take appropriate actions.
- **RMA orders**: View all Return Merchandise Authorization (RMA) orders for your defective assets and take appropriate actions.
- **RMA order lines**: View all Return Merchandise Authorization (RMA) order lines within your RMA orders and take appropriate actions.
- **Transfer orders**: Create transfer order workflows for moving assets between your stockrooms.
- **Recall orders**: Create recall order workflows for assets that have been recalled by the asset vendor.
- **Reclamation requests**: View and fulfill all your reclamation requests.
- **Resale orders**: View and fulfill all your asset resale requests.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Move orders**: Create and view move orders for assets that need to be moved from one location to another.
- **Repair orders**: View the list of repair orders submitted for repair of assets with your stockroom. You can also create repair orders.

Enterprise asset estate overview for Enterprise Asset Workspace

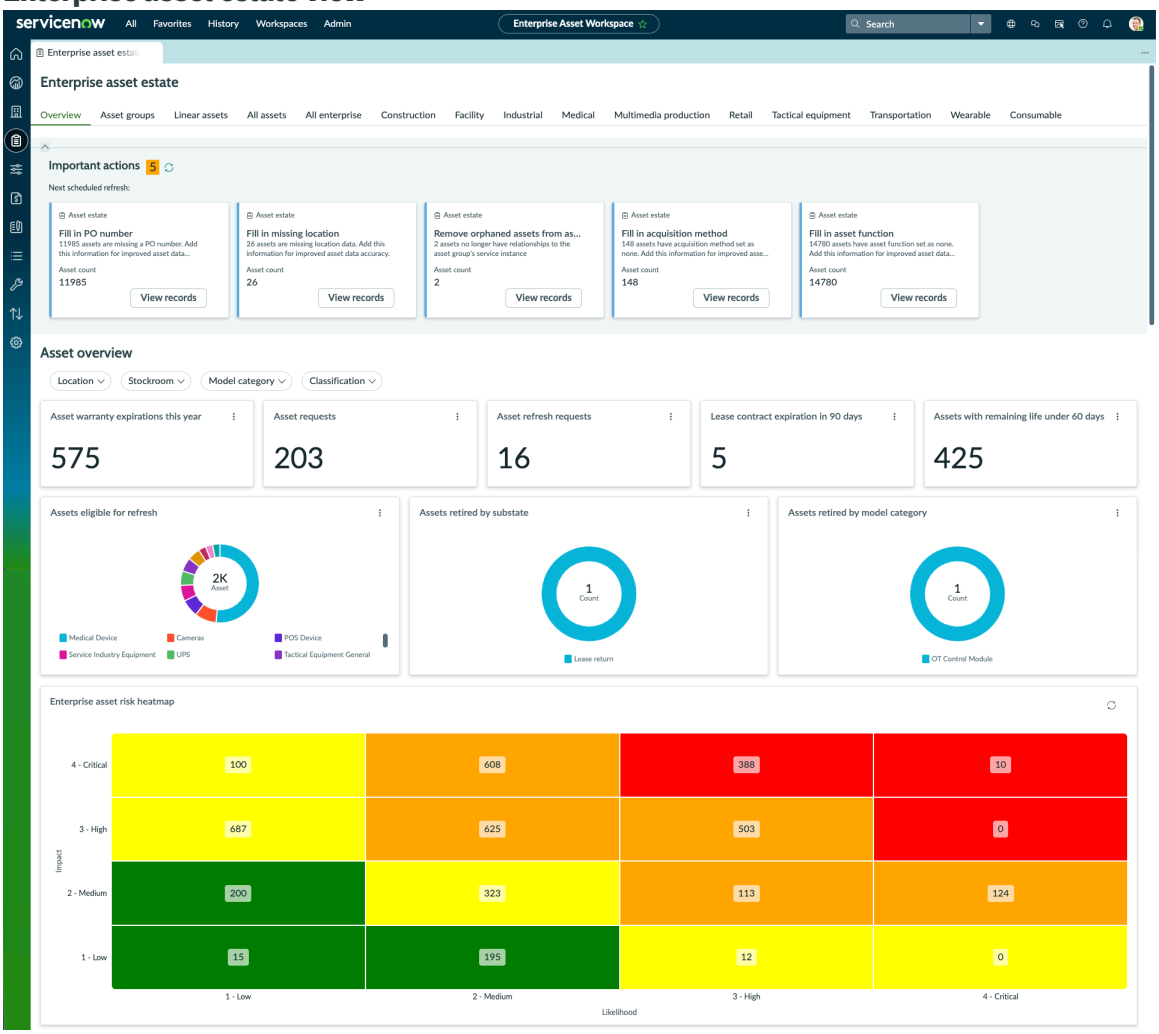
Use the Enterprise asset estate view in the Enterprise Asset Workspace to create and manage your assets. You can also view details such as asset life cycle by state, disposed assets this year, and asset requests.

Take care of any urgent asset related action items such as entering a missing asset tag or asset function.

You can access the Enterprise asset estate view by navigating to **Enterprise Asset Workspace** > **Enterprise asset estate**.

To access detailed information and take relevant action, select any widget. You can also narrow down your results by using the **Location**, **Stockroom**, **Model category**, and **Classification** filters.

Enterprise asset estate view



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise asset estate overview

Widget or chart	Description
Asset warranty expirations this year	Number of assets that are expiring in the current year.
Asset requests	Number of enterprise and consumable asset requests in the Service Catalog.
Assets refresh requests	Number of assets that are pending refresh.
Lease contract expiration in 90 days	Number of contracts that are expiring in 90 days.
Assets with remaining life under 60 days	Number of assets that are reaching their end-of-life in less than 60 days.
Assets eligible for refresh	Assets that are nearing their end-of-life and are eligible for refresh.
Assets retired by substate	Assets that are currently retired, grouped by their substate.
Assets retired by model category	Assets that are currently retired, grouped by their model category.
Enterprise asset risk heat map	Risk heat map for the number of assets that have the likelihood and impact values. To view this heat map, ensure that the band score records in the Risk Score module are frozen.

Enterprise model management overview for Enterprise Asset Workspace

Use the Enterprise model management view in the Enterprise Asset Workspace to create and manage enterprise models. You can also view details such as model lifecycle overview, model status, and enterprise models up for end of life.

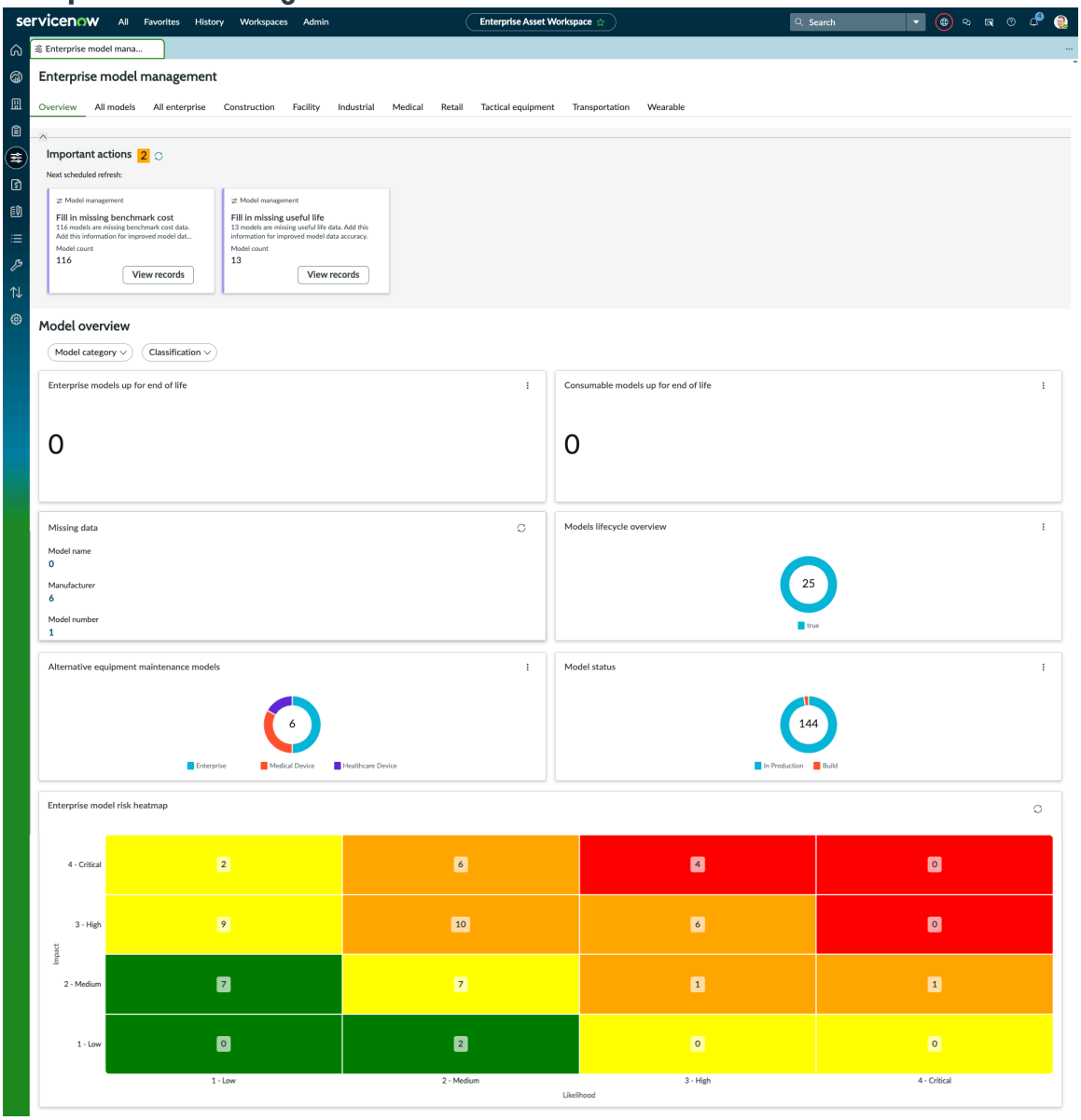
Take care of any urgent model related action items such as entering a missing model number or manufacture name.

You can access the Enterprise model management view by navigating to **Enterprise Asset Workspace** > **Enterprise model management**.

To access detailed information and take relevant action, select any widget. You can also narrow your results by using the **Model category** filter.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise model management view



Model overview

Widget or chart	Description
Enterprise models up for end of life this year	Count of enterprise models whose start date of the end of life phase is the current year.
Consumable models up for end of life this year	Count of consumable models whose start date of the end of life phase is the current year.
Missing data	Count of models that have missing model name, manufacturer, and model number.
Model lifecycle overview	Count of models that are present in each life cycle stage such as General Availability, End of Support, End of Life, and End of Sale.
Alternate equipment maintenance models	Count of models for which alternate equipment maintenance is enabled and are grouped by model categories.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Model overview (continued)

Widget or chart	Description
Model status	Current count of models based on the status of the models.
Enterprise model risk heat map	Displays the risk heat map for number of models that have the likelihood and impact values. To view this heat map, ensure that the band score records in the Risk Score module are frozen. **Note:** If risk likelihood, risk impact, and risk score are not frozen, the heat map is rendered in a draft mode with no risk values in the model record. If only one of these vectors is frozen, the heat map is not rendered. If all three vectors are frozen, the heat map is rendered in a production mode and the risk values are populated in the model record.

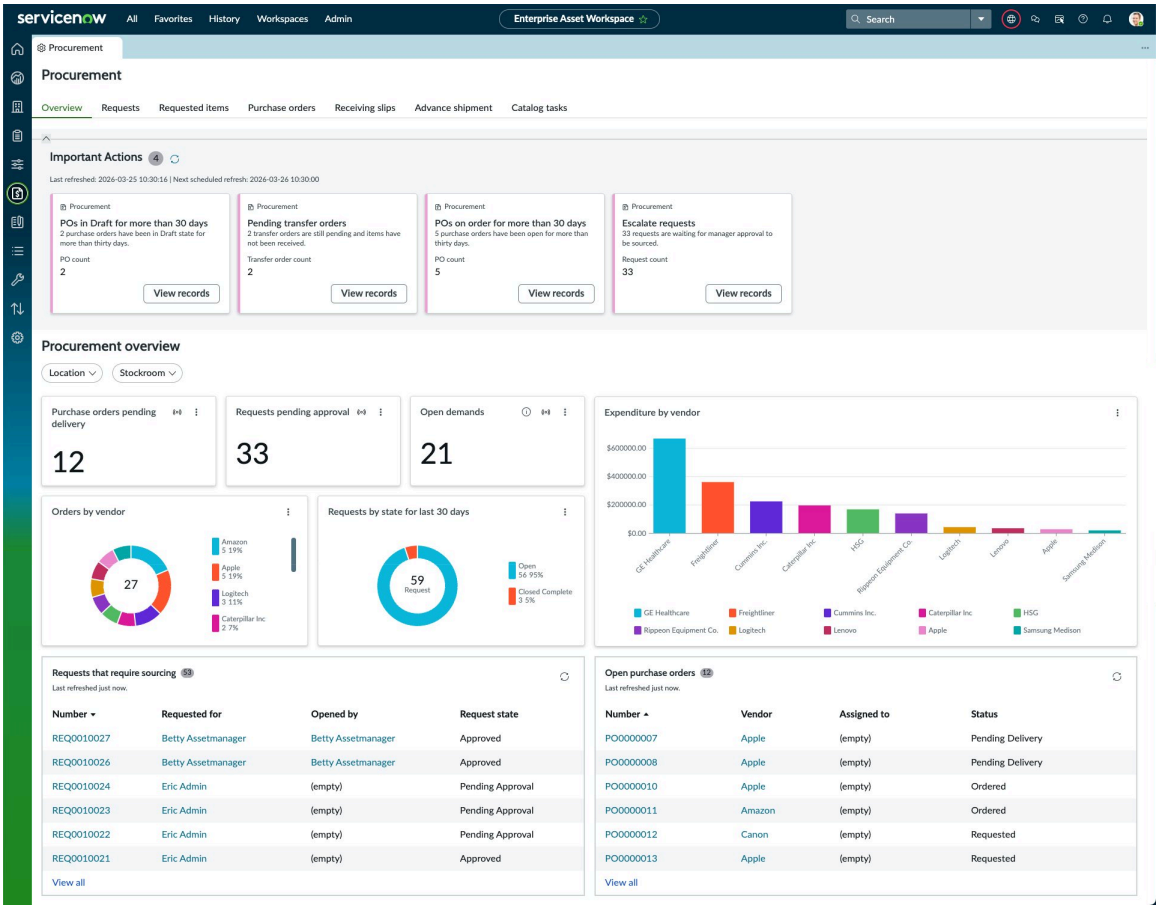
Procurement overview for Enterprise Asset Workspace

View and manage procurement-related details such as procurement requests, purchase orders, sourcing tasks, and receiving slips through the Enterprise Asset Workspace.

The Procurement view in the Enterprise Asset Workspace provides access to actions for managing your open requests, pending purchase orders and transfer orders, and requests that need manager approval.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procurement view



Select any widget or chart to view more specific details. You can also narrow down your results by using the **Location**, **Stockroom**, and **Domain** filters.

Note: The Domain filter is available only when you've enabled the Domain Extensions Installer (com.glide.domain.msp_extensions.installer) and Domain Separation (plugin com.snc.pa.domain_support) plugins.

Procurement overview

Widget or chart	Description
Purchase order pending delivery	Count of purchase orders that aren't received and aren't canceled. Only purchase orders that have a status of Requested, Ordered, or Pending Delivery are displayed.
Requests pending approval	Count of sourceable and active requests with the request state of Pending approval.
Expenditure by vendor	Cost that you've paid to each of your vendors for procuring the inventory. Only purchase orders that have a status of Ordered, Pending Delivery, or Received are listed.
Orders by vendor	Counts of purchase orders that have been ordered, are pending delivery, or have been received by individual vendors.
Requests by state for last 30 days	Requests created in the last 30 days grouped by their state.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procurement overview (continued)

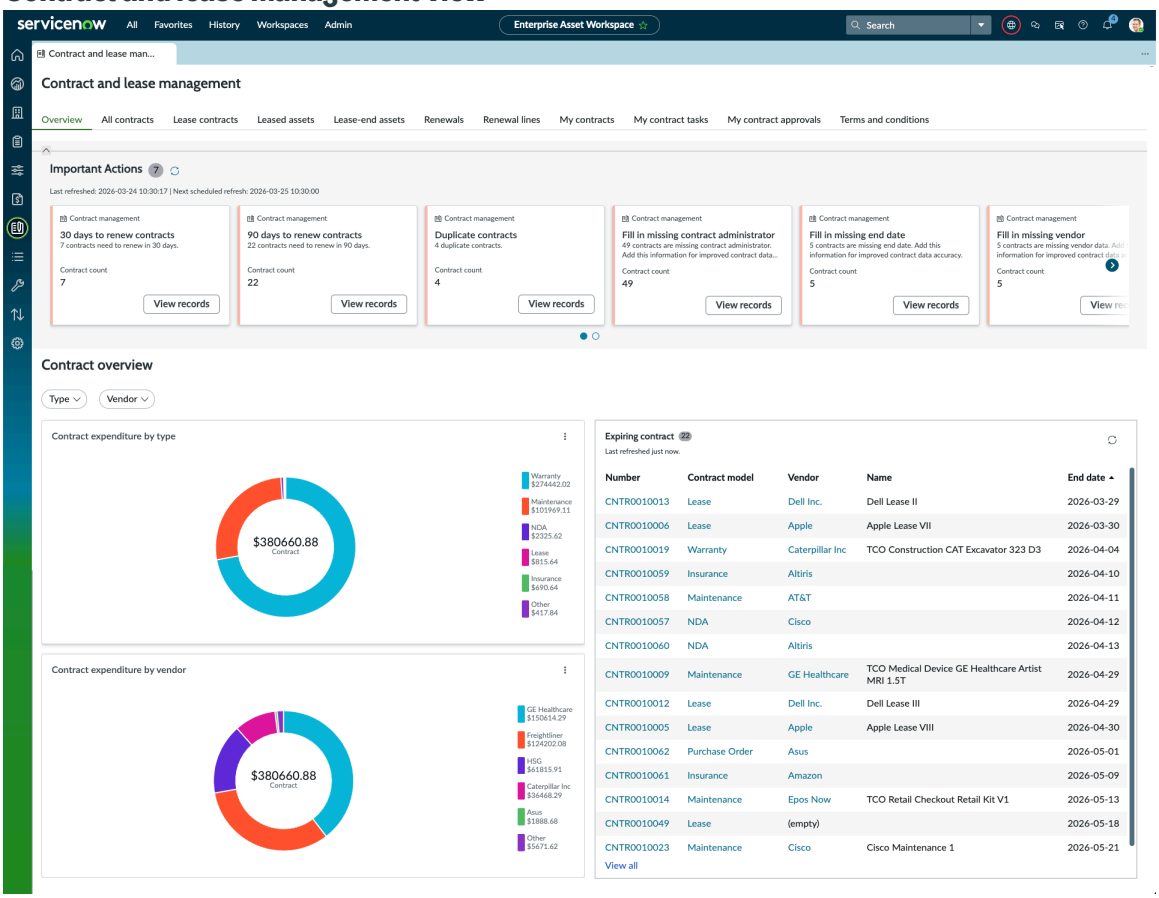
Widget or chart	Description
Requests that require sourcing	List of requests for which a purchase order, local order, or transfer order hasn't been initiated.
Open purchase orders	List of purchase orders that have been requested or ordered or have not been delivered.

Contract and lease management overview for Enterprise Asset Workspace

Use the Contract and lease management view in the Enterprise Asset Workspace to create and manage your enterprise asset contracts.

You can access the Contract and lease management view by navigating to **Enterprise Asset Workspace** > **Contract and lease management**.

Contract and lease management view



Use the following tabs to view and manage your enterprise asset contracts:

- **Overview**: Get a glimpse of all your contract data, including the contract expenditure by type, contract expenditure by vendor, and expiring contracts. You can narrow down this data by using the Domain, Type, and Vendor filters.

  In addition, view all important actions for your enterprise asset contracts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **All contracts**: Create and view contracts for your enterprise assets. Supported contract types include lease, insurance, maintenance, warranty, purchase agreement, non-disclosure, terms & conditions, service, purchase order, software license, and subscription.
- **Lease contracts**: Create and view contracts for your leased enterprise assets.
- **Leased assets**: View all leased enterprise assets across your organization.
- **Lease-end assets**: View all leased enterprise assets that are associated with contracts for which the lease-end process has begun. Take action on any of the leased enterprise assets that do not have a State of Complete.
- **My contracts**: View all enterprise asset contracts that you are managing.
- **My contract tasks**: View all open tasks for the enterprise assets that are associated with the contracts you are managing.
- **My contract approvals**: View all enterprise asset contract and contract renewal requests that are waiting for your approval.
- **Terms and conditions**: Create and view terms and conditions for your enterprise asset contracts.

For more information on contracts, see Contract Management.

Asset operations overview for Enterprise Asset Workspace

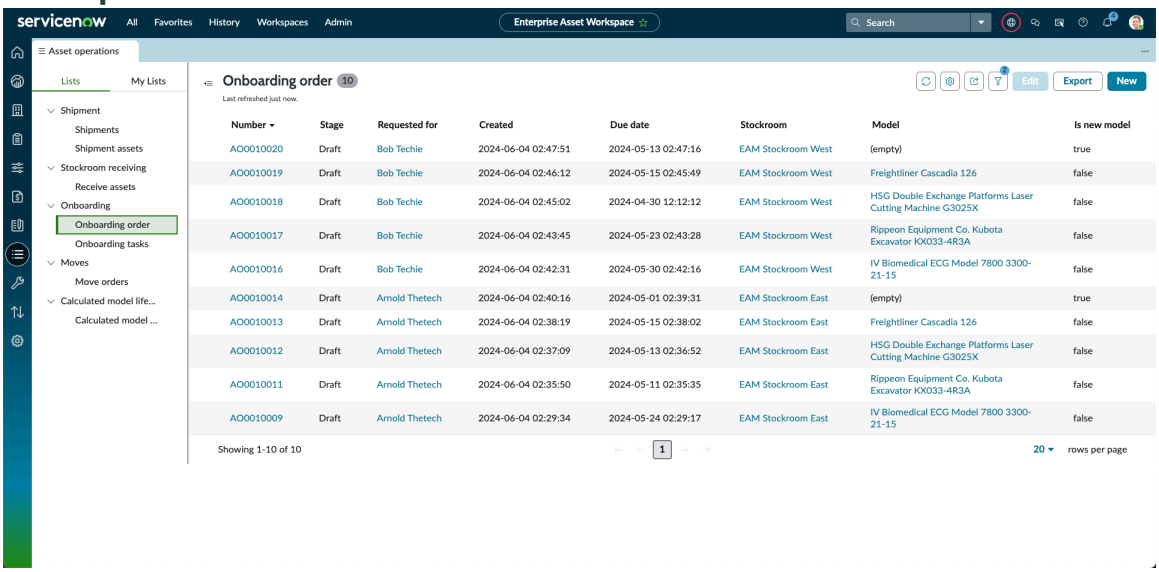
Use the Asset operations view in the Enterprise Asset Workspace to track and manage shipments, service catalog requests, requested items, catalog tasks, and contract renewal requests.

Use the Asset operations view to perform the following tasks:

- View and create shipments
- Create shipment notifications
- View onboarding requests and tasks
- Create and view move orders.
- Create onboarding orders to onboard multiple enterprise assets at one go. For more details, see Onboarding multiple enterprise assets in the Enterprise Asset Workspace.
- Create Calculated model lifecycle templates for enterprise models. For more details, see Manage the lifecycle of enterprise models with calculated lifecycle templates.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset operations view



After you've created your request in the Service Catalog application, you can view the request, the requested items, the catalog tasks, and source the request from the Enterprise Asset Workspace.

Note: All requests created for hardware assets and enterprise assets are listed in the **Requests** list section. Similarly all catalog tasks created for hardware assets and enterprise assets are listed in the **Catalog tasks** list section. The Requested items list section only shows the requested items pertaining to enterprise assets.

Work management overview for Enterprise Asset Workspace

Use the Work management view in the Enterprise Asset Workspace to create and manage maintenance plans, work orders, and work order tasks.

Important: Before you can access and use the Work management view, edit your Field Service Management configurations as needed. See Edit Field Service Management configurations for the Work management view for detailed instructions.

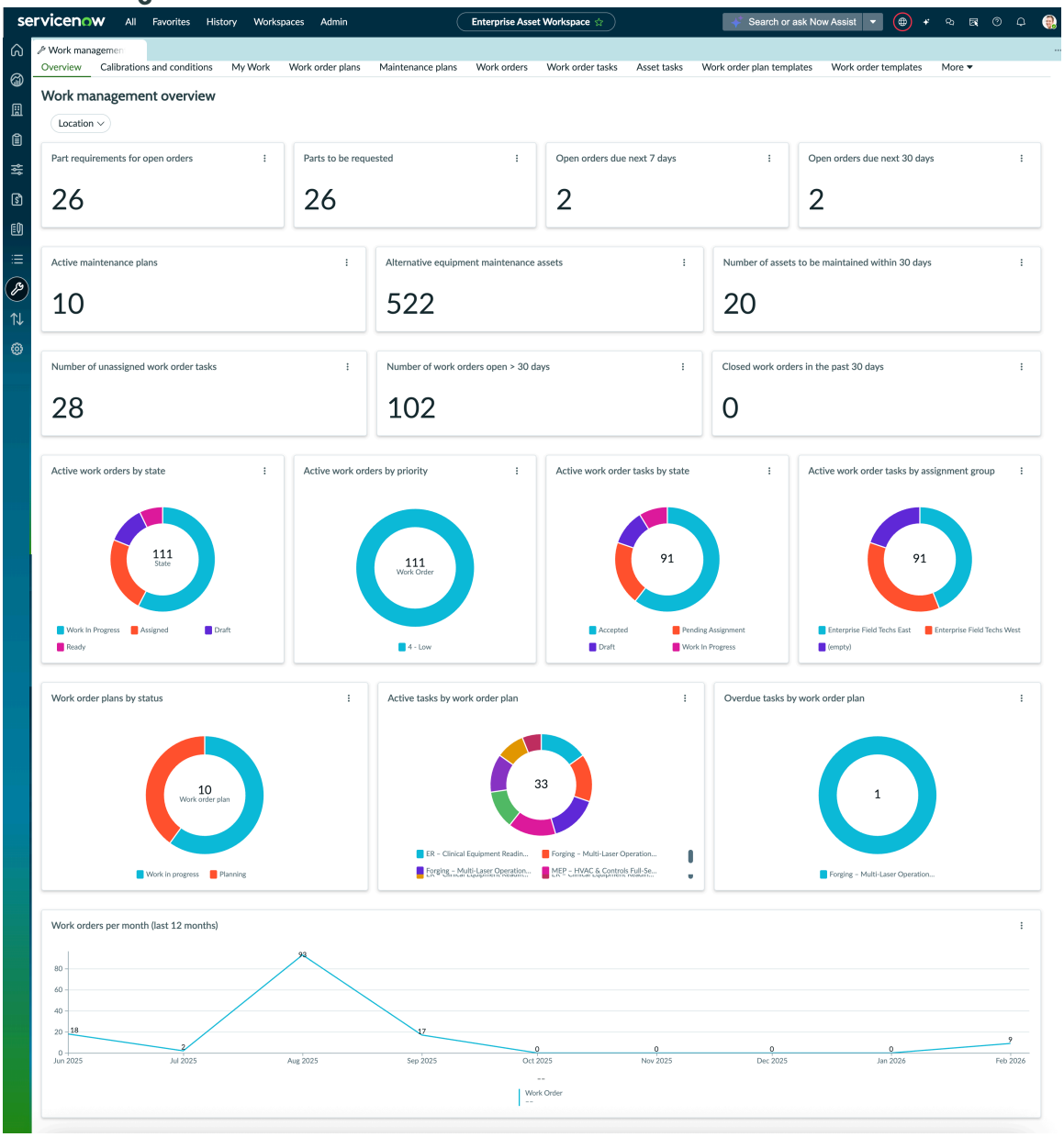
You can access the Work management view by navigating to **Enterprise Asset Workspace** > **Work management**.

Note: Only users with the system administrator (admin), enterprise asset manager (sn_eam.enterprise_asset_manager), and agent (wm_agent) roles can access the Work management view.

To access detailed information and take relevant action, click any widget. You can also narrow your results by using the **Location** filter.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Work management view



Use the following tabs to view and manage your work orders, work order tasks, maintenance plans, and other relevant work order information:

Note: The tabs that appear on the Work management view differ based on your assigned role.

- **Overview**: Get a glimpse of all your work order data, such as part requirements for open orders, active work orders by state, work orders per month, and active maintenance plans.

  Note: This tab appears if you have the system administrator (admin) or enterprise asset manager (sn_eam.enterprise_asset_manager) role.

- **Calibrations and conditions**: Get a glimpse of all your calibration data and an overview of asset conditions.

  Note: This tab appears if you have the system administrator (admin) or enterprise asset manager (sn_eam.enterprise_asset_manager) role.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **My work**: View all open requests and tasks that are associated with your work orders.

  Note: This tab appears if you have the system administrator (admin) or agent (wm_agent) role.

- **Maintenance plans**: Create and view maintenance plans for your enterprise assets.

  Note: This tab appears if you have the system administrator (admin) or enterprise asset manager (sn_eam.enterprise_asset_manager) role.

- **Work orders**: Create and view work orders for any planned or ad-hoc work that you want to perform on your enterprise assets.

  Note: This tab appears if you have the system administrator (admin), enterprise asset manager (sn_eam.enterprise_asset_manager), or agent (wm_agent) role.

- **Work order tasks**: View all work order tasks that are associated with your work orders.

  Note: This tab appears if you have the system administrator (admin), enterprise asset manager (sn_eam.enterprise_asset_manager), or agent (wm_agent) role.

- **Asset tasks**: View all tasks for the enterprise assets that are associated with your work orders.

  Note: This tab appears if you have the enterprise technician (enterprise_asset_technician) or agent (wm_agent) role.

- **Work order templates**: Create and view templates for your work orders.

  Note: This tab appears if you have the system administrator (admin) or enterprise asset manager (sn_eam.enterprise_asset_manager) role.

- **Checklist templates**: Create and view checklist templates for your work orders.

  Note: This tab appears if you have the system administrator (admin) or c.

- **My stockroom assets**: View enterprise assets that are available within your stockrooms.

  Note: This tab appears if you have the system administrator (admin) or agent (wm_agent) role.

- **My asset pickup tasks**: View all scheduled pickup tasks for the enterprise assets that are associated with your work orders.

  Note: This tab appears if you have the system administrator (admin) or agent (wm_agent) role.

- **Work order plan templates**: Create and view work order plan templates.

  Note: This tab appears if you have the enterprise asset manager (sn_eam.asset_manager) role.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Work order plans**: Create and view work order plans.

  Note: This tab appears if you have the enterprise asset manager (sn_eam.asset_manager) role.

  The Overview tab also displays work order plan reports that include **Work order plans by status**, **Active tasks by work order plan**, and **Overdue tasks by work order plan**.

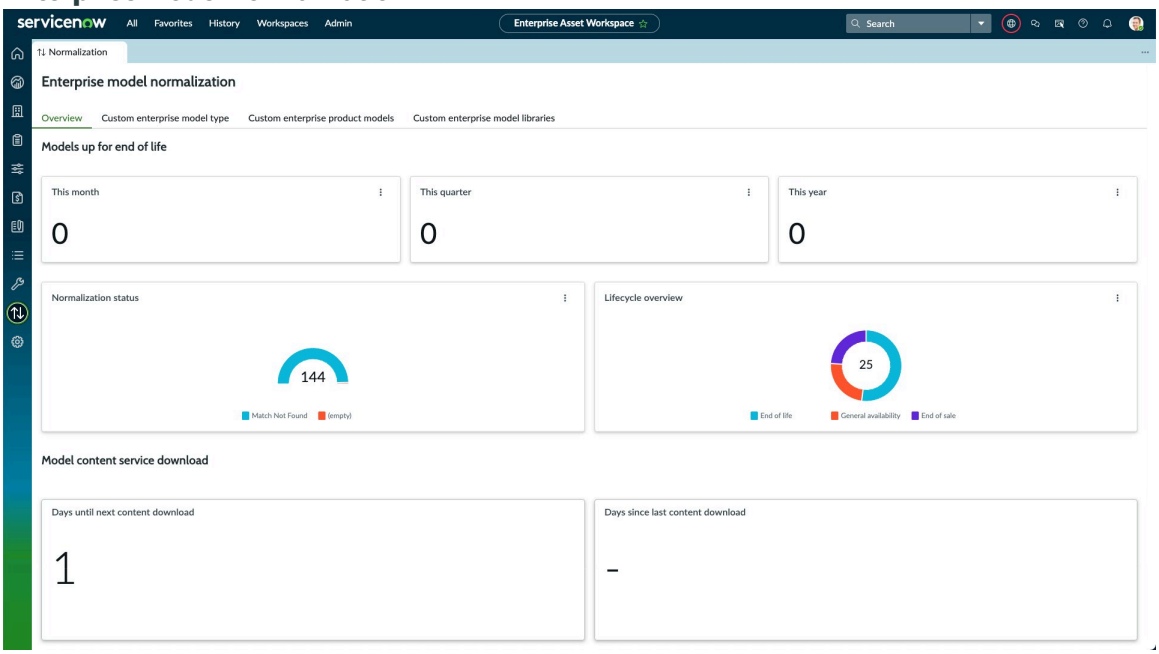
Normalization overview for Enterprise Asset Management

Use the Normalization view in the Enterprise Asset Workspace to view information related to normalization such as normalization status, model content service download, lifecycle overview.

You can also create custom enterprise model types, product models, and model libraries from this view.

You can access the Normalization view by navigating to **Enterprise Asset Workspace** > **Normalization**.

Enterprise model normalization



Normalization widgets

Widget	Source	Description
Enterprise models up for end of life	Enterprise Model Lifecycle [sn_eam_model_lifecycle]	The beginning phase of the end of life for enterprise models. Shows the count of enterprise models whose start date of the end of life phase is either the current month, quarter, or year.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Normalization widgets (continued)

Widget	Source	Description
		Note: Only enterprise model life cycle records that are active, model status is in production, and life cycle type is Publisher appear in **This month**, **This quarter**, or **This year**
Normalization status		Normalization status of all the enterprise models. View the count of enterprise models that were normalized and those models that didn't get normalized. For details on the normalization status, see Normalization status for enterprise models.
Lifecycle overview	Enterprise Model Lifecycle [sn_eam_model_lifecycle]	The count of enterprise models that are present in each life cycle stage: General availability, end of support, end of extended support, and end of sale. **Note:** Only enterprise model life cycle records that are active appear in this widget.
Enterprise model content service download. • Days until next content download • Days since last content download	Data Services Download Schedules [cds_client_schedule]	The days since the content service library was last downloaded on your instance and the days remaining for the next download to take place.

Admin center overview for Enterprise Asset Workspace

Use the Admin center view in the Enterprise Asset Workspace to perform all your configuration and administrative tasks.

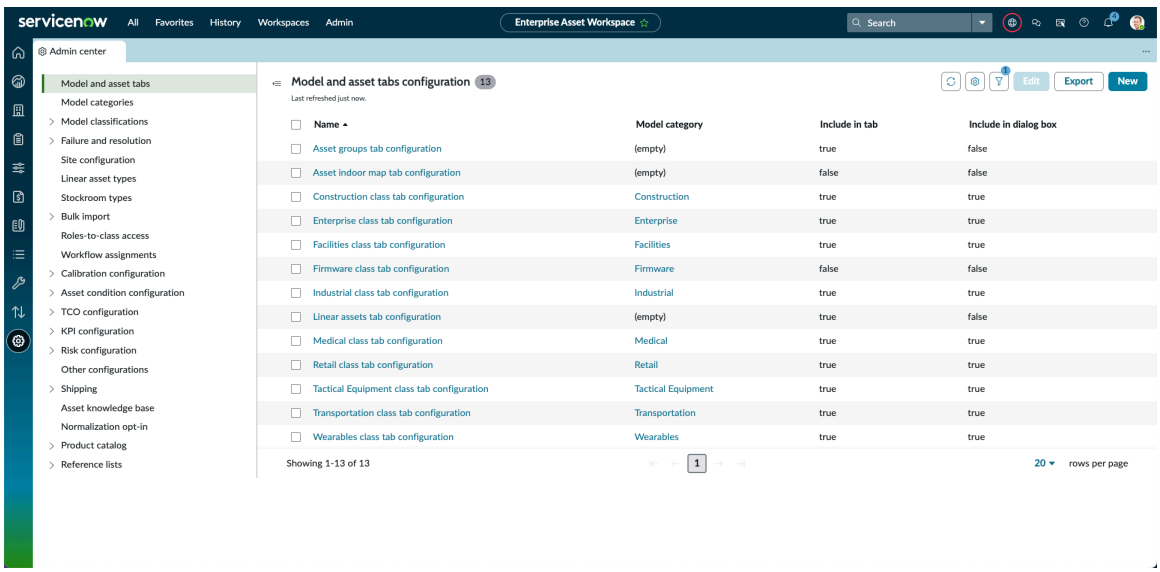
Only the Enterprise admin [sn_eam.enterprise_admin] and the Enterprise asset manager [sn_eam.enterprise_asset_manager] roles can view and perform operations in the Admin center view.

Use the Admin center to perform the following tasks:

- Configure model and asset tabs
- Create model categories

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Create and import classification codes
- Create sources for classification codes
- Create linear asset types
- Create stockroom types
- Import enterprise models and assets
- Workflow assignments
- Create and view task rate and labor rate cards
- Create configuration values for risk likelihood, risk impact, and risk scores
- Create shipment carriers
- Integrate with third-party shipping carriers
- Create a knowledge article
- Opt-in to Enterprise Asset Management
- Create failure and resolution codes
- Set up the configurations to monitor the key performance indicators (KPIs) of the enterprise assets



Configurable workspaces

Use configurable workspaces to create and manage assets and models for your specific industry or operational environment.

Overview of configurable workspaces

Configurable workspaces are available for the following applications:

- Enterprise Asset Management for Healthcare
- Enterprise Asset Management for Facilities
- OT Asset Management
- Enterprise Asset Management for Data Center and Network Asset Management (DCNAM)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configurable workspaces give you a personalized experience as you work on assets and models pertaining to your industry or operational environment.

Application	Configurable workspace	Benefits
Enterprise Asset Management for Healthcare	Medical Asset Workspace	Create and manage medical assets and models.
Enterprise Asset Management for Facilities	Facility Asset Workspace	Create and manage facilities assets and models.
OT Asset Management	OT Asset Workspace	Create and manage operational technology and operational equipment assets and models.
Enterprise Asset Management for Data Center and Network Asset Management (DCNAM)	Critical Environment Asset Workspace	Create and manage data center and network infrastructure assets, including facility-based enterprise assets and linear assets.

Note: The normalization process only runs in the Enterprise Asset Workspace and doesn't run for models within specific workspaces.

Workspace roles

The workspace that you can access depends on the role with which you log in to your ServiceNow instance. You can only view and work in the workspaces for which you have an assigned role.

Roles for accessing workspaces

Workspace	Role needed
Medical Asset Workspace	• Medical asset manager (sn_eamhc.medical_asset_manager) • Medical asset technician (sn_eamhc.medical_asset_technician) • Enterprise admin [sn_eam.enterprise_admin] • System administrator [sys_admin]
Facility Asset Workspace	• Facility asset manager (sn_eamhc.facility_asset_manager) • Facility asset technician (sn_eamhc.facility_asset_technician) • Enterprise admin (sn_eam.enterprise_admin) • System administrator (sys_admin)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles for accessing workspaces (continued)

Workspace	Role needed
OT Asset Workspace	• OT asset manager (sn_otam.ot_asset_manager) • OT asset technician (sn_otam.ot_asset_technician) • Enterprise admin (sn_eam.enterprise_admin) • System administrator (sys_admin)
Critical Environment Asset Workspace	• DCNAM asset manager (sn_eam_dcnam.dcnam_asset_manager) • DCNAM asset technician (sn_eam_dcnam.dcnam_asset_technician) • Enterprise admin (sn_eam.enterprise_admin) • System administrator (sys_admin)
All workspaces	• Enterprise admin (sn_eam.enterprise_admin) • System administrator (sys_admin)

Role-based visibility in workspaces

When you log in with an industry-specific role, your workspace view is scoped to your industry by default. For example:

- If you're logged in as a medical asset manager or medical asset technician, you see only the medical asset category in the Medical asset estate view and the medical model category in the Medical model management view.
- If you're logged in as a facility asset manager or facility asset technician, you see only the facility asset category in the Facility asset estate view and the facility model category in the Facility model management view.
- If you're logged in as an OT asset manager or OT asset technician, you see only OT and OE asset and model categories in the OT asset estate view and OT model management view.

You may also see asset and model categories outside your industry if they were added by the Enterprise admin or System administrator. These categories are read-only — you can't create or modify assets or models in them.

Asset performance

You can evaluate how effectively your assets are functioning and being used through reports based on asset key performance indicators (KPIs) in the Asset performance tab of the Asset analytics view. The asset performance report is also available on the contextual sidebar of the asset record, displayed by selecting the Asset availability and related KPIs icon  . For details, see Asset performance reports in the Enterprise Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Unified receiving

You can receive assets from any workflow directly at the stockroom using the unified receiving functionality available in all industry-specific workspaces. You can receive assets in any of the following ways:

- Receive a single asset
- Receive multiple assets in a shipment
- Import assets in bulk and receive them

For more details, see Unified receiving.

Inventory reports

You can manage supply and demand in your stockrooms effectively with inventory demand reports. Navigate to the Inventory insights tab in any stockroom to view the reports. For more details, see Manage stockrooms with inventory reports.

Accessing the Admin center

Only the Enterprise admin role and the System administrator role can make configuration changes in the **Admin center** of any industry-specific workspace.

Industry-specific manager and technician roles can't make changes in the Admin center except for the **Task rate card and Labor rate card** options under the **TCO configuration** list.

Roles to class mapping for configurable workspaces

In configurable workspaces, roles can access classes in addition to the default seeded classes for each specific role.

New roles are assigned to each configurable workspace. New roles are based on the following applications and their designated workspace.

Application	Designated workspace	Roles
Enterprise Asset Management for Healthcare	Medical Asset Workspace	• sn_eamhc.medical_asset_manager • sn_eamhc.medical_asset_technician
Enterprise Asset Management for Facilities	Facility Asset Workspace	• sn_eamfam.facility_asset_manager • sn_eamfam.facility_asset_technician
Operational Technology (OT) Asset Management	OT Asset Workspace	• sn_otam.ot_asset_manage • sn_otam.ot_asset_technician

A default configuration of classes is seeded for each role that maps to its corresponding model category.

The following mapping is a default configuration that is seeded for the Medical, the Facilities, and the OT technician roles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The manager roles include the respective technician roles for Enterprise Asset Management for Healthcare, Enterprise Asset Management for Facilities, and Operational Technology (OT) Asset Management applications.

Roles to classes access

Enterprise roles	Seeded model categories	Seeded enterprise classes for roles
Medical technician sn_eamhc.medical_asset_technician	Medical	sn_ent_medical_model sn_ent_medical_device_model sn_ent_medical_asset
Facility technician sn_eamfam.facility_asset_technician	Facilities	sn_ent_facility_model sn_ent_facility_asset
OT technician sn_otam.ot_asset_technician	Industrial, Hardware	sn_ent_industrial_asset sn_ent_industrial_model, alm_hardware cmdb_hardware_product_model sn_ent_firmware_model sn_ent_discov_firmware_model

The Roles to classes access table shows the various classes that each role has access to by default. For example, the facility technician role has access to the facility classes: sn_ent_facility_model and sn_ent_facility_asset. When a facility technician logs in to the Facility Asset Workspace, they will automatically get access to only the models and assets related to the Facilities model category.

Based on the mapping, roles get access to the respective asset and model classes. The roles further get access to the workflow tasks and work orders related to those classes. Additionally, you can view information only pertaining to your classes on all dashboards in the workspace. For example, a medical asset manager role can initiate disposal orders only for medical assets because of access configuration. Similarly, a facilities technician role can only work on disposal tasks created for facility assets.

The Enterprise admin (sn_eam.enterprise_admin) role can modify the default configuration to add more classes to a role. So, the roles for the Medical Asset Workspace, the Facilities Asset Workspace, and the OT Workspace can be configured to access additional classes from different model categories. For example, the Medical technician role can get access to the Facilities classes. Similarly, the Facilities technician role can get access to the Transportation classes. For more details on adding additional classes to a role, see Map enterprise roles to enterprise classes.

Note: A soft filter exists in configurable workspaces that shows information relevant to a particular workspace. You can remove that filter to display assets and models for all classes but only read access is available for the other classes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise Asset Management data model

The Enterprise Asset Management data model provides a structured framework for representing, tracking, and managing physical assets and their relationships throughout their life cycles.

Enterprise Asset Management data model overview

The Enterprise Asset Management data model defines how asset-related data is created, classified, synchronized, and governed. It is not a single table or diagram. Instead, it is a connected set of entities and relationships that act as guardrails for how asset-related data flows from initial definition through procurement, operation, maintenance, and retirement.

Enterprise models and assets

The Enterprise Asset Management data model uses enterprise models and assets to separate standardized asset definitions from real-world physical objects.

- An enterprise model defines an enterprise asset type. Each enterprise model contains a set of asset specifications, attributes, and structural compositions, including information about whether its associated assets are standalone or multi-component.
- An enterprise asset represents a real-world physical object that is purchased, received, deployed, and tracked throughout its operational life. Every enterprise asset is created from an enterprise model.

Core components of the Enterprise Asset Management data model

The Enterprise Asset Management data model is built around three core structural components: enterprise model classes, enterprise asset classes, and Configuration Management Database (CMDB) CI classes.

Enterprise model classes

Enterprise model classes are tables that store enterprise model records. Records are organized by model type, such as the facility model or medical model. Each enterprise model class defines a set of attributes that are common to all enterprise model records stored within the given table. Extended enterprise model classes inherit attributes from their parent model classes, enabling consistent data standardization across related model types.

For more information on enterprise model classes, see Enterprise model and asset classes.

Enterprise asset classes

Enterprise asset classes are tables that store enterprise asset records. Records are organized by asset type, such as industrial assets or medical assets. Enterprise asset classes categorize assets based on their function or usage, helping you define maintenance strategies, compliance rules, and life-cycle workflows for different asset types.

For more information on enterprise asset classes, see Enterprise model and asset classes.

CMDB CI classes

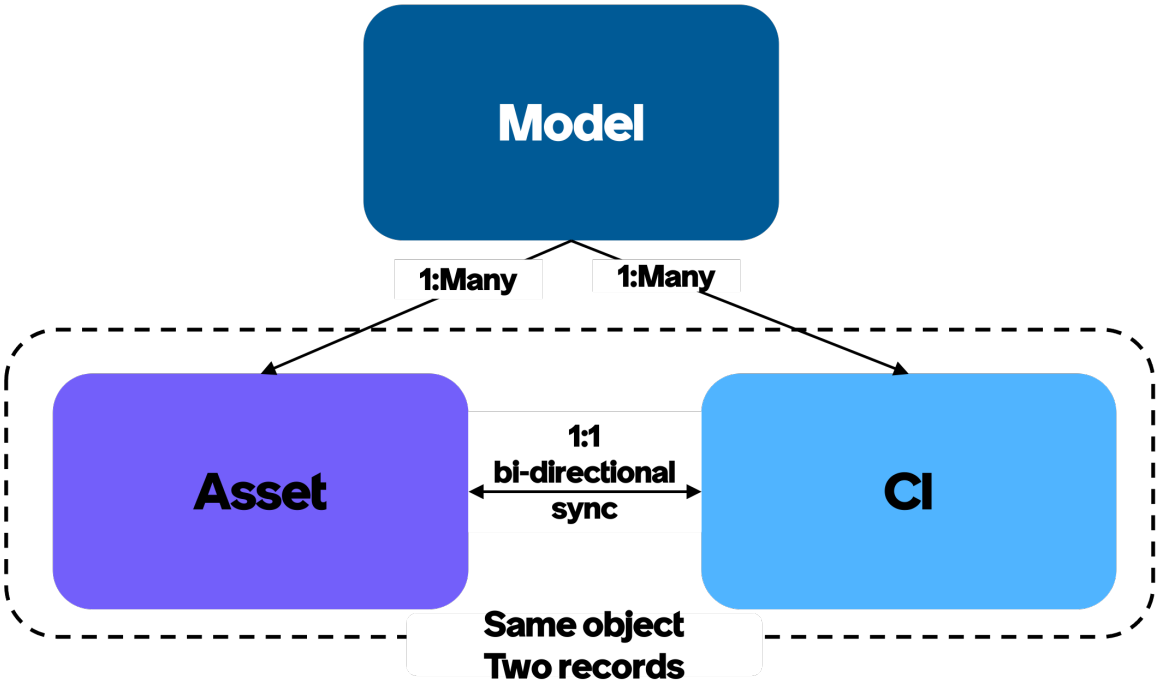
CMDB CI classes are tables that store configuration item (CI) records. Each CMDB CI class maps to corresponding enterprise model and asset classes through model categories, creating a unified view of assets across the Enterprise Asset Management application and the CMDB.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information on the CMDB and CMDB CI classes, see Configuration Management Database (CMDB).

These core components link to each other through enterprise model categories. Each enterprise model category maps an appropriate enterprise model class, enterprise asset class, and CMDB CI class together for a given enterprise asset type. The associated models, assets, and CIs can then work together across various workflows throughout the asset life cycle, including procurement and maintenance. For more information on model categories, see Model categories.

Relationship between enterprise models, enterprise assets, and CIs

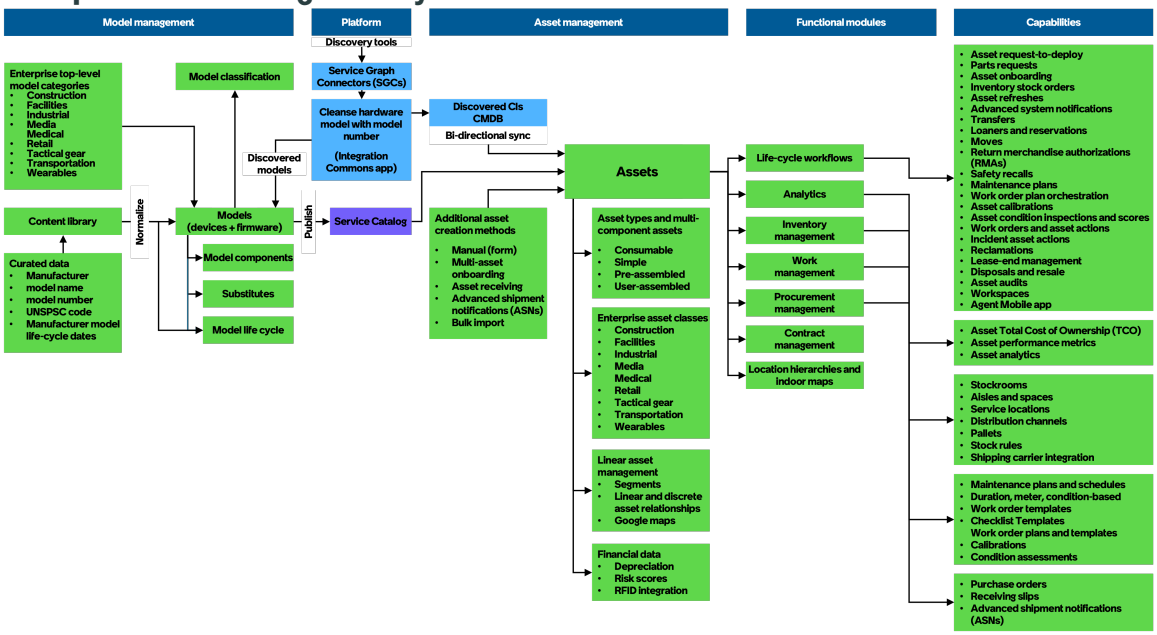


Enterprise Asset Management system architecture

The system architecture of the Enterprise Asset Management application is comprised of components that extend beyond the core data model components. Together, these components support the end-to-end asset management process, from procurement to disposal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise Asset Management system architecture



Enterprise Asset Management system architecture components

Component	Description
Model management	Supported model management features and capabilities: • Standardized asset definitions • Enterprise Asset Management Content Library • Enterprise model classifications
Discovery	Supported discovery features and capabilities: • Service Graph Connectors • CI discovery aligned with enterprise model categories
Asset management	Supported asset management features and capabilities: • Asset creation • Categorization of assets by asset type • Linear asset management • Bi-directional asset and CI synchronization • Financial data tracking
Functional modules	Supported functional modules in which you can perform tasks and complete workflows: • Life-cycle workflows • Analytics • Inventory management • Work management • Procurement management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise Asset Management system architecture components (continued)

Component	Description
	• Contract management • Location hierarchies and indoor maps
Capabilities	Supported capabilities within each functional module. Examples include asset onboarding and stockroom management. For the complete list of capabilities within each module, refer to the previous Enterprise Asset Management system architecture diagram.

Enterprise model and asset classes

The Enterprise Asset Management application supports enterprise model and asset classes that extend base classes within the Configuration Management Database (CMDB) class hierarchy. These extensions include class descriptions, identification rules, and dependent relationships.

To access enterprise model and asset classes in the Enterprise Asset Management application, you must install the Expanded Model and Asset Classes application from the ServiceNow® Store. For more information on this application, see Expanded Model and Asset Classes.

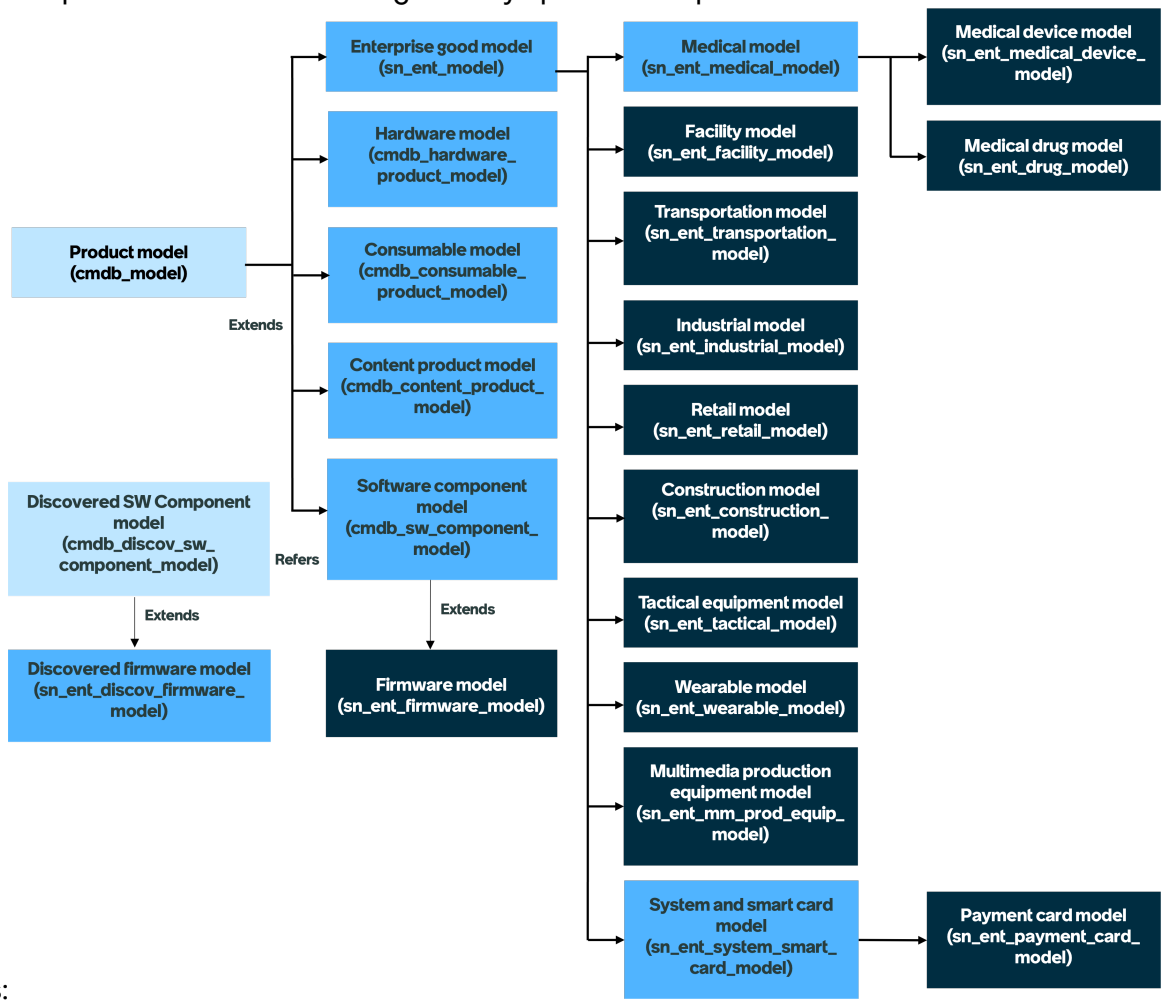
Enterprise model and asset classes form the structural backbone of the Enterprise Asset Management data model. These classes are organized into class hierarchies, in which child classes extend their parent classes and inherit all parent attributes. The Enterprise Asset Management application establishes relationships between enterprise model classes and enterprise asset classes through model categories. For more information on model categories, see Model categories.

Supported enterprise model classes

The Enterprise Asset Management application supports the Enterprise good model [sn_ent_model] class, Firmware model [sn_ent_firmware_model] class, and Discovered firmware model [sn_ent_discov_firmware_model] class, which extend the base Product model [cmdb_model] class. The Enterprise good model [sn_ent_model] class is the primary model class for enterprise assets in the Enterprise Asset Management application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

It is also the parent class of the following industry-specific enterprise model child



classes:

Enterprise good model child classes

Enterprise good model child class	Description
Medical model [sn_ent_medical_model]	Classifies medical-based enterprise models, such as ER Medical Cart Kit and ECG Electrodes.
Medical device model [sn_ent_medical_device_model]	Classifies medical device-based enterprise models, such as Blood Pressure Monitor and MRI Patient Table. **Note:** When you upgrade to version 1.2.0 or later of the Expanded Model and Asset Classes application, the application automatically runs the `Update medical device category` fix script to associate the Medical Device model [sn_ent_medical_device_model] class with the existing Medical device model category. However, you may need to manually reclassify existing enterprise models under the Medical device model category from the Medical model [sn_ent_medical_model] class to the Medical Device model [sn_ent_medical_device_model] class. Refer to KB1182183 for detailed instructions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise good model child classes (continued)

Enterprise good model child class	Description
	Product Instance Identifier (PID) which is a unique and common identifier that links the asset, CI, and IBI classes is generated for the assets of Medical Device model category. PID is generated based on the PID configurations applicable for the Medical Device model category. The Product Instance Identifier Configurations [product_instance_identifier_configuration] table stores the PID configurations. By default, the following configurations are available: • **PID - Serial number** that includes a parameter defined based on the Serial number field of the Asset [alm_asset] table. • **PID - Parent** that includes parameters defined based on the Parent and Model Component ID fields of the Asset [alm_asset] table. When many PID configurations are associated with the Medical Device model category, the configuration with the highest priority is considered first during the generation of the PID. The PID - Serial number configuration is mostly given the highest priority.
Medical drug model [sn_ent_drug_model]	Classifies medical drug-based enterprise models, such as Amoxicillin and Prilosec.
Facility model [sn_ent_facility_model]	Classifies facility-based enterprise models, such as HVAC Split System and Wire Shelf.
Transportation model [sn_ent_transportation_model]	Classifies transportation-based enterprise models, such as Disc Brake Rotor Front and Fuel Cell Car.
Industrial model [sn_ent_industrial_model]	Classifies industrial-based enterprise models, such as CNC Milling Machine and Laser Cutting Machine.
Retail model [sn_ent_retail_model]	Classifies retail-based enterprise models, such as Retail Counter Scale and 80mm Thermal Receipt Printer.
Tactical equipment model [sn_ent_tactical_model]	Classifies tactical equipment-based enterprise models, such as K19 Plate Carrier and Triple Mag Pouch.
Construction model [sn_ent_construction_model]	Classifies construction-based enterprise models, such as Excavator and Hex Breaker Hammer Kit.
Wearable model	Classifies wearable asset-based enterprise models, such as N95 Respirator and High-vis Safety Vest.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise good model child classes (continued)

Enterprise good model child class	Description
[sn_ent_wearable_model]	
Multimedia production equipment model [sn_ent_mm_prod_equip_model]	Classifies multimedia production equipment-based enterprise models, such as Production Camera and Modular Broadcast Console.
System and smart card model [sn_ent_system_smart_card_model]	Classifies system card- and smart card-based enterprise models, such as Smart Card and Magnetic Stripe Card.
Payment card model [sn_ent_payment_card_model]	Classifies payment card-based enterprise models, such as Debit Card and Credit Card.

Important: Starting with the Zurich release, the Classification (classification) column of the Enterprise good model [sn_ent_model] table has been deprecated and renamed as Classification (deprecated). Data from the deprecated column is now available in the Classification (classification_code) column of the Product model [cmdb_model] table.

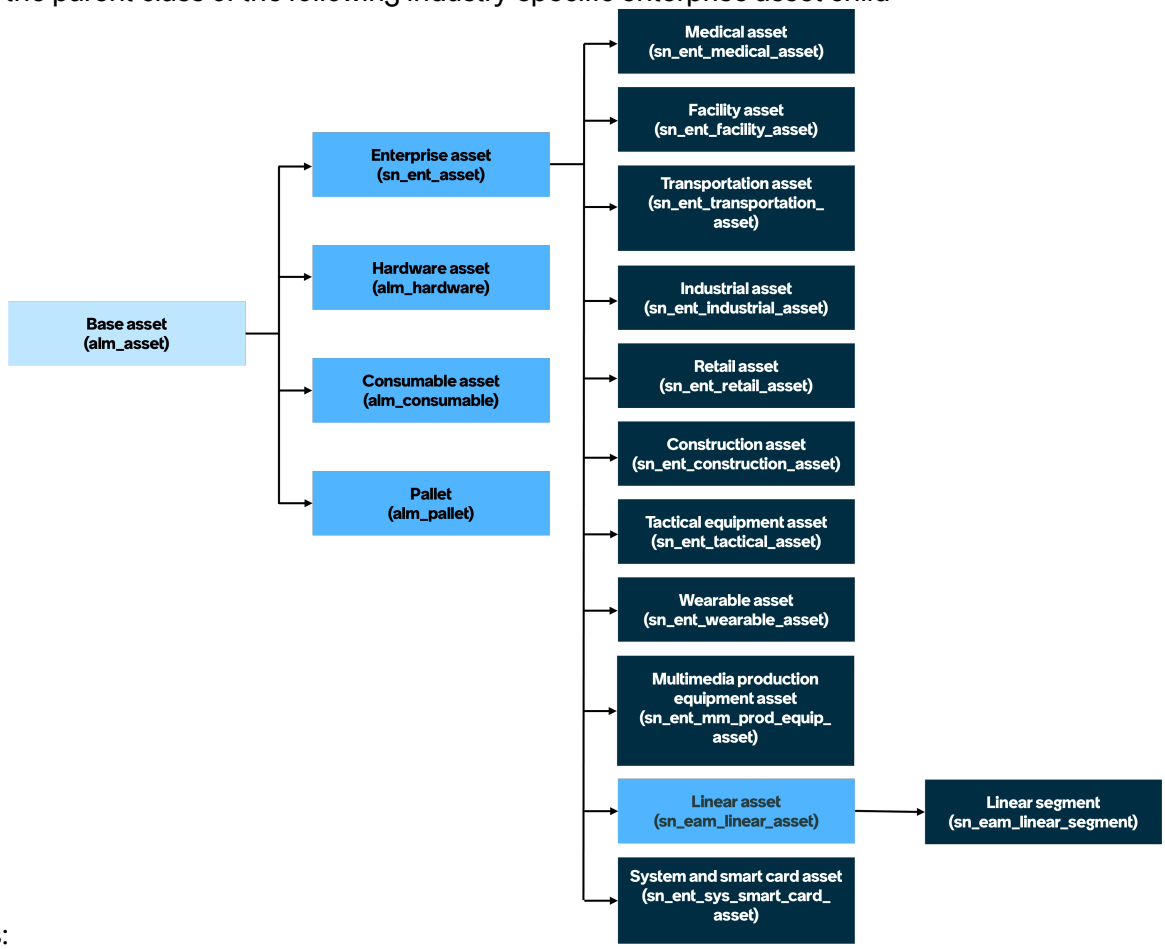
Note: The Enterprise Asset Management application does not classify consumable models through the Consumable model [cmdb_consumable_product_model] class that is available in the base CMDB class hierarchy. Instead, you can manually designate any enterprise model in any model category as consumable by setting the **Model type** field to **Consumable** on the corresponding enterprise model record.

Supported enterprise asset classes

The Enterprise Asset Management application supports the Enterprise asset [sn_ent_asset] class, which extends the Base asset [alm_base] class. The Enterprise asset [sn_ent_asset]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

class is the parent class of the following industry-specific enterprise asset child



classes:

Enterprise asset child classes

Enterprise asset child class	Description
Medical asset [sn_ent_medical_asset]	Classifies medical-based enterprise assets, such as hospital beds and X-ray machines.
Facility asset [sn_ent_facility_asset]	Classifies facility-based enterprise assets, such as coffee makers and HVAC systems.
Transportation asset [sn_ent_transportation_asset]	Classifies transportation-based enterprise assets, such as airplanes and brake pads.
Industrial asset [sn_ent_industrial_asset]	Classifies industrial-based enterprise assets, such as forklifts and casting machines.
Retail asset [sn_ent_retail_asset]	Classifies retail-based enterprise assets, such as display cases and clothing racks.
Tactical equipment asset [sn_ent_tactical_asset]	Classifies tactical equipment-based enterprise assets, such as hydration carriers and tactical plate carriers.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise asset child classes (continued)

Enterprise asset child class	Description
Construction asset [sn_ent_construction_asset]	Classifies construction-based enterprise assets, such as sledgehammers and hand saws.
Wearable asset [sn_ent_wearable_asset]	Classifies wearable enterprise assets, such as helmets and uniforms.
Multimedia production equipment asset [sn_ent_mm_prod_equip_asset]	Classifies multimedia production equipment, such as video mixers and broadcast sync generators.
System and smart card asset [sn_ent_sys_smart_card_asset]	Classifies system cards and smart cards, such as magnetic stripe cards.

Note: The Linear asset [sn_eam_linear_asset] class is the parent class of the Linear segment [sn_eam_linear_segment] class, which classifies specific sections of a linear asset. For more information on linear assets and linear asset segments, see Linear assets in Enterprise Asset Management.

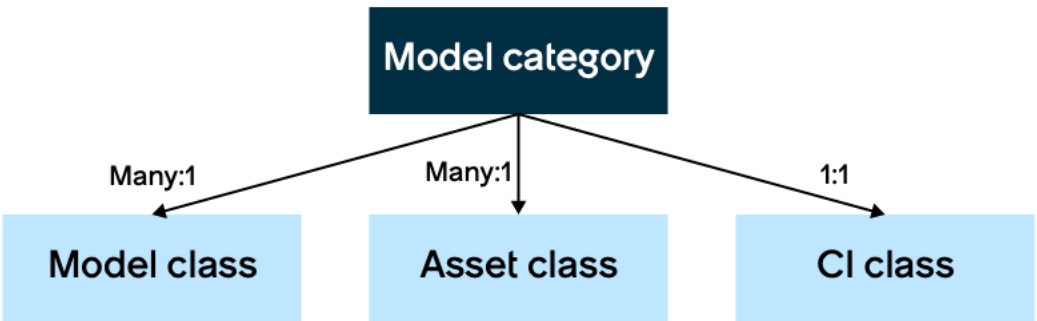
Model categories

Model categories define the relationships between enterprise model classes, enterprise asset classes, and Configuration Management Database (CMDB) CI classes in Enterprise Asset Management. Model categories connect every enterprise asset to the correct model class, asset class, and CI class.

Overview of model categories

When you create an enterprise model, you assign it to a model category. The assignment determines:

- The model class for the model record
- The asset class for assets created from that model
- The CI class for the corresponding CMDB CI record



Model category assignments follow these rules:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Multiple model categories can share the same model class or asset class.
- A CI class can be assigned to only one model category, and this assignment is optional.

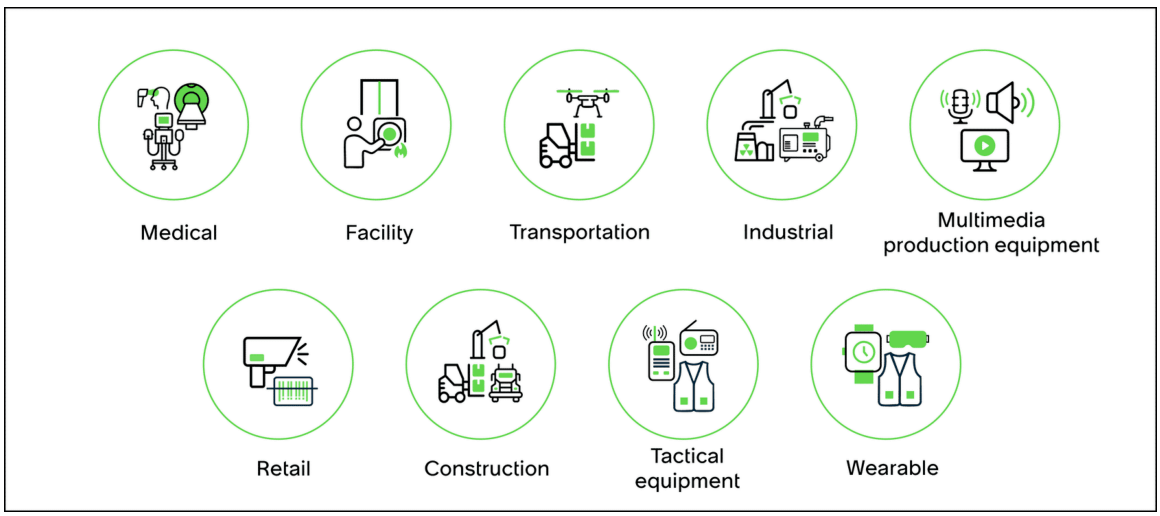
Model category functions

Beyond routing records into the correct classes, model categories serve three purposes:

1. Asset and CI record creation: EAM uses the model category to place assets in the correct asset class and create linked CI records in the correct CI class.
2. Bi-directional asset-CI synchronization: The model category mapping keeps asset and CI records in sync. Changes to state, location, or assignment are reflected in both records.
3. Discovery and identification rules: Model categories use configured CMDB IRE rules to define asset unique identifiers. These identifiers determine how the system recognizes assets when data arrives from Discovery or Procurement.

Parent and child model categories

Model categories are organized in a two-tier hierarchy. Parent model categories represent the nine top-level industry domains. Child model categories sit beneath a parent and carry the actual class mappings assigned to model records.



For the complete list of available model categories and their corresponding CMDB CI class, asset class, and model class, see Enterprise model categories and corresponding classes.

Important: Use only the existing top-level parent model categories.

Creating custom model categories

If none of the existing child model categories meet your needs, you can create a custom child category under an existing parent. When creating a child category, you specify the parent model category, model class, asset class, and optionally a CI class. For details, see Create model categories

Important:

Custom model categories must be children of one of the nine seeded parent categories. Creating new top-tier parent categories is not supported.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Model classification

Use model classification to organize and categorize enterprise models and their associated assets in a structured, consistent way across the ServiceNow platform.

Overview of classification

Classification codes are structured identifiers assigned to enterprise models. After assigned to a model, a classification code is automatically inherited by all assets created from that model. Classification codes serve a descriptive purpose — supporting reporting, analysis, and grouping — distinct from model categories, which serve a technical purpose by binding model, asset, and CI class tables together.

Model categories vs. Model classifications

Characteristic	Model categories	Model classifications
Purpose	Technical — bind model, asset, and CI class tables	Business — organize and classify models for reporting and management
Seeded out-of-the-box	Yes — 9 parent, approximately 95 child categories	No — imported or created by an administrator
Standard	Platform-defined	Industry standard or customer-defined
Drives	Discovery routing, asset-CI synchronization	Filtering, reporting, and taxonomy

Classification behavior

Assigning classification to models

Classifications are assigned directly to a model record. Only classifications valid for the model's category are selectable. After assignment, the classification applies automatically to all associated assets.

Model category field

A classification with a model category defined is only available to models within that category. A classification without a model category applies to all models.

Multi-tier hierarchy

Classifications support a parent-child hierarchy. Parent classifications represent higher-level categories; child classifications inherit attributes including source and model category. Each child code can have only one parent. Ancestor lists are automatically generated and updated when parent relationships change.

Classifications in reporting and dashboards

Classifications can be used as filters in:

- Enterprise asset overview
- Enterprise asset dashboard
- Inventory
- Enterprise model management
- Enterprise asset estate

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Filtering by a parent classification includes all models and assets associated with that code and all child codes. If the parent is not itself assigned to any model, results still show assets from child codes.

Industry classification systems

The Enterprise Model Classification table is not seeded out-of-the-box. Organizations can adopt an industry-standard taxonomy or define their own custom system.

Commonly used industry classification systems

Classification system	Description	Enterprise Asset Management (EAM) example
CSI OmniClass	Classification of construction elements	Standardized categories for air-distribution components (ducts, diffusers, fans)
CSI UniFormat	Classification of buildings by functional elements, systems, and assemblies	Groups elements such as substructure, shell, interiors, and services consistently
ECRI	Healthcare equipment classification	Classifies MRI machines, ventilators, and infusion pumps for conformance and patient safety
GICS	Global industry standard	Classifies turbines and substations in energy companies for external reporting
ISO 14224	Reliability and maintenance data collection	Monitors failure rates and downtime for robotic arms, conveyors, and CNC machines
NAICS	US, Canada, and Mexico industry classification	Maps conveyors, HVAC, or facility systems into industry codes for reporting
UNSPSC	Global goods and services taxonomy	Confirms pumps and compressors are consistently classified in procurement workflows

Examples of classification systems applied in EAM

Uniformat II applied to a hospital facility

Level 1 code	Level 2 category	Hospital-specific examples
A	Substructure	Foundations, basements for imaging or radiation therapy rooms
B	Shell	Structural frames, exterior walls, windows, and roofing
C	Interiors	Patient rooms, nurse stations, operating rooms, and ICU units
D	Services (MEP systems)	Specialized HVAC, medical gases, emergency power, plumbing, and fire protection
E	Equipment and furnishings	MRI, X-Ray, surgical tables, patient beds, and clinical furniture
F	Special construction	Radiation shielding, clean rooms, and isolation rooms

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Uniformat II applied to a hospital facility (continued)

Level 1 code	Level 2 category	Hospital-specific examples
G	Building sitework	Ambulance entrances, helipads, parking lots, and landscaping
Z	General	General conditions, overhead, administration, and contingency

Related topics

- Create a source for classification codes
- Import classification codes

Model types in Enterprise Asset Management

Every enterprise model in the Enterprise Asset Management application is assigned a model type that determines its structural nature. Each enterprise model can represent standalone enterprise assets, quantity-tracked consumable assets, or complex assemblies that are comprised of multiple components.

The Enterprise Asset Management application supports the following model types:

Supported model types

Model type	Description
Consumable models	Represents consumable assets that you can track by quantity, such as safety gloves, printer cartridges, and lubricants. Can also represent individual components within a multi-component model. **Note:** The Enterprise Asset Management application does not classify consumable models through the Consumable model [cmdb_consumable_product_model] class that is available in the base CMDB class hierarchy. Instead, you can manually designate any enterprise model in any model category as consumable by setting the **Model type** field to **Consumable** on the corresponding enterprise model record.
Simple models	Represents standalone enterprise assets that you can track individually, such as office furniture and hand-held scanners. These enterprise assets do not have a component structure or any child assets.
Pre-assembled models	Represents equipment that you receive as complete, pre-configured assemblies from a vendor. You must define each assembly component in the corresponding enterprise model record before creating any assets that represent those components.
User-assembled models	Represents equipment that you must assemble on-site using components from your existing inventory. With this model type, all required components must be readily available in your stockrooms before any assembly begins.

Multi-component models and assets in Enterprise Asset Management

Multi-component models and multi-components assets help you track the maintenance of your enterprise assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Multi-component model

An enterprise model that is associated with one or more model components is defined as a multi-component model. Each model component can be a consumable or enterprise model. The same model can be listed more than once as a model component.

Every model component has three mutually-exclusive properties that define its relationship with the parent multi-component model.

Model component properties

Property	Description
Required	If this property is set to **true**, the model component is essential for the multi-component model to function and cannot be removed permanently.
Hot swappable	If this property is set to **true**, the model component can be replaced while the multi-component model is operational.
Repairable	If this property is set to **true**, the model component can be repaired when it fails.

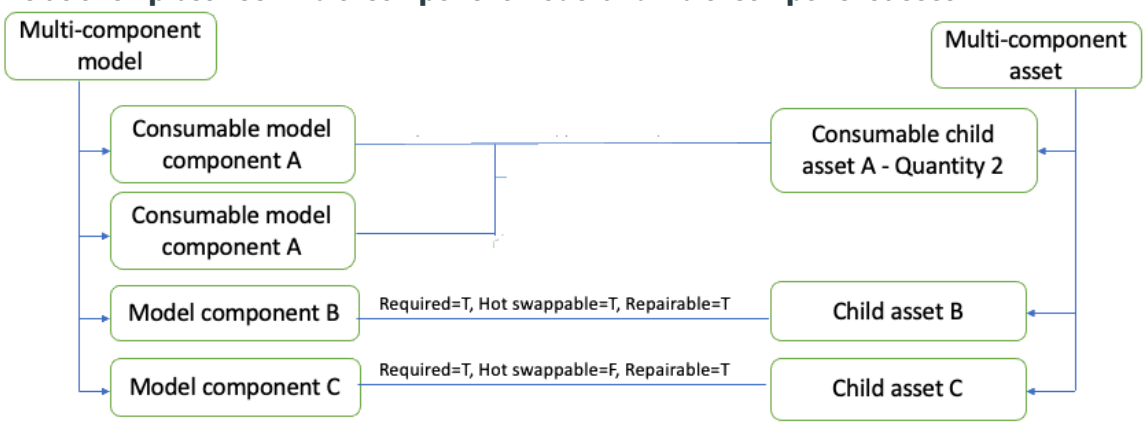
The Enterprise Asset Management application supports two types of multi-component models: pre-assembled and user-assembled. You can convert a pre-assembled or user-assembled model to a simple model by removing all of its associated model components while it is in the Build state.

Multi-component asset

Multi-component assets are created from a multi-component model.

The Enterprise Asset Management application supports two types of multi-component assets: serialized assets and consumable assets. Serialized child assets are created for model components. Consumable model components that are listed more than once are merged into a single consumable child asset with the combined component quantity.

Relationship between multi-component model and multi-component asset



Pre-assembled and user-assembled assets

Assets that are associated with pre-assembled and user-assembled multi-component models are referred to as pre-assembled and user-assembled multi-components assets, respectively.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Pre-assembled asset: Child assets are automatically created when a parent asset is created. These child assets are created and placed in the same stockroom that the parent asset was created in. Each child asset inherits various properties from the parent asset, including the asset stockroom, state, and sub status.

  If you want to add additional child assets to an existing parent asset, you can use add-on assets. These assets do not have to be defined through the original model components. If you use an add-on asset, the Asset type of the parent asset is automatically updated to Pre-assembled with add-on.

- User-assembled asset: Assets that are assembled using components from the parent asset stockroom. You can assemble these assets using either of the following methods:
  - Manual assembly: Manually select the required components and assemble the asset by using the **Assemble** button in the asset record. For details, see Select assets for user-assembled asset.
  - Automatic assembly: Automatically select the required components and assemble the asset by using the **Auto-assemble** button in the asset record. If the required quantity of components is unavailable in your stockrooms, an error appears. You must then assemble the asset manually.

If a parent asset is in one of the following states, you can swap its child assets with any other assets that are created for the same model component:

- In Use
- In Maintenance
- In Stock Defective
- In Stock Pending Repair

Note: For more details on swapping assets, see Swap assets for parent multi-component asset.

Multiple components for an enterprise model

You can simultaneously add multiple components to an enterprise model by specifying the component quantity in the **Quantity** field of the Add model components dialog box.

- For serialized components, each row in the dialog box splits into multiple model components based on the quantity that you specify in the **Quantity** field. For example, if you set the **Quantity** field to 10 for a given row, 10 model component records are created for that row.
- For consumable components, one model component record is created per row. Each record indicates the quantity that you specify in the **Quantity** field. For example, if you set the **Quantity** field to 10 for a given row, only one model component record is created with a quantity of 10.

Component number usage for consumable components

Since consumable assets don't have asset tags or serial numbers, the **Component number** field in your model component records can help you identify and track your consumable child assets. This component number is propagated to the display name of the child asset as a prefix.

Component number usage for serialized components

Since serialized assets can have asset tags, component numbers are optional for serialized child assets. You can specify a component number only if you set the **Quantity** field of the Add model

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

components dialog box to `1`. If you set this field to a value greater than one, the component number is generated automatically. If a serialized child asset does not have an asset tag, the component number is propagated as the asset tag. Any asset tag that you later add overrides the component number.

Asset groups in Enterprise Asset Management

Asset groups in the Enterprise Asset Management application provide a systematic approach to organizing assets based on their functional relationships and their physical placement within an organization. They can help improve data integrity and support maintenance planning, life-cycle tracking, reporting, and access control.

Organization of assets in Enterprise Asset Management

In the Enterprise Asset Management application, assets are organized through the following hierarchy types:

- Location hierarchy: Hierarchy that defines the physical locations of your assets, organized based on the real-world location structure of those assets. This hierarchy enables location-based filtering, maintenance routing, and reporting.
- Asset groups: Logical groupings of related assets and subgroups. Each asset group represents a functional system, process, or department within your organization.
- Asset structure: Hierarchy that defines the parent-child relationships between assets. This hierarchy can help you complete work on your assets, plan spare parts, and track your asset life cycles.

Overview of asset groups

An asset group is a logical grouping of assets. Each asset group can have multiple subgroups; however, a subgroup can belong to only one asset group. An asset can belong to multiple groups.

For details on creating asset groups and subgroups, see Create an asset group in Enterprise Asset Management and Create an asset subgroup in Enterprise Asset Management. For details on adding assets to asset groups, see Add assets to an asset group or subgroup.

Note: A subgroup inherits some fields from its parent group. For details on the fields that get inherited, see Fields inherited from a parent asset group to a sub group.

Sites in asset groups

A site is an ISA-95 hierarchical entity model. Sites are organized in a hierarchical structure, with site being the top-level entity, followed by area, work center, and work unit.

You can associate an asset group to a site. This association enables all CIs that are associated with that specific site to also associate with the asset group.

Note: Only assets from the associated site and its specific location can be added to the asset group.

For details on creating sites, see Create a site in the Enterprise Asset Management application.

Service instances and asset groups

An asset group or subgroup can optionally reference a service instance to pull all related assets from a chosen node in the given CI hierarchy. A subgroup can reference a service instance only if its parent group references one.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Considerations for asset groups

Keep the following considerations in mind for asset groups:

- An asset group can’t contain itself as a subgroup.
- An asset group can’t have a model or model category, as it's a separate entity.
- An asset group can't be deleted if it contains subgroups or assets. To delete an asset group, the sn_eam.enterprise_asset_manager or the sn_eam.enterprise_admin role must first remove any subgroups and assets from the asset group.

Considerations for adding assets to asset groups

Keep the following considerations in mind while adding assets to asset groups:

- You can add only assets without a parent.
- You can add only hardware and enterprise assets. You can't add any consumable assets, linear assets, linear segments, or pallet assets.
- Assets must be in the same location as the asset group or in a descendent location.
- Asset must be in the In use or In maintenance state.

Considerations for asset groups in Enterprise Asset Management flows and capabilities

Asset groups are unavailable in the following Enterprise Asset Management flows and capabilities:

- Asset resale flow
- Transfer order line management
- Repair order line management
- Disposal order management
- Shipment asset creation
- Contract management
- Move order management
- Any flow where the asset requires a model

Plugin dependencies for asset groups

Asset groups require the sn_isa_model plugin, which is automatically installed with the Enterprise Asset Management application.

Linear assets in Enterprise Asset Management

Expand your asset management portfolio by creating and managing linear assets.

Overview of linear assets

A linear asset is an asset that has a physical length or dimension, such as roads, railways, pipelines, power transmission lines, and telecommunication networks. Each linear asset has a defined start point and end point and can be represented as a sequence of interconnected segments or nodes. A segment is a specific linear asset section that is defined either by a start point and an end point or by a start point and a length.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: For more details on the terminology that is used for linear assets, see Terminology for linear assets.

Note: You can classify and manage linear assets by using the Linear asset [sn_eam_linear_asset] class. This class extends the Enterprise asset [sn_ent_asset] class.

If a linear asset is divided into segments, you can classify and manage those segments by using the Linear segments [sn_eam_linear_segment] class. This class extends the Linear asset [sn_eam_linear_asset] class.

These classes are available only through the Expanded Model and Asset Classes application. For more information on this application, see Enterprise model and asset classes.

Geo maps for linear assets

You can create and manage linear assets and segments using geographic (geo) maps. Geo maps are visual representations of geographical areas, displaying geographical elements such as landforms, bodies of water, cities, and roads.

The Enterprise Asset Management application uses the sn-geo-map UI component to power map visualizations for linear assets. Only users with the Enterprise Asset Manager (sn_eam.enterprise_asset_manager) role can access geo maps.

Geo maps help you perform the following actions in the Enterprise Asset Workspace:

- Draw linear assets to define coordinates.
- Set segment start and end markers.
- Set markers for discrete assets.
- View related assets such as overlapping assets, intersecting assets, and continuing assets.

Discreet asset relationships

You can associate your linear assets with discreet assets, which are enterprise assets and consumables that exist at specific points along a linear asset. For example, a pressure valve is a discreet asset that is installed at regular intervals along a pipeline. These associations enable you to track and manage your discreet assets as part of your linear assets.

You must assign each discreet asset a marker, which is a specific point location that falls within the boundary width of the associated linear asset. You can use this information to locate and query each discreet asset through the associated linear asset.

For more information on discreet assets, see Associate a discrete asset to a linear asset.

Linear asset relationships

The Enterprise Asset Management application supports the following linear asset relationships:

Overlapping linear assets

Assets that are in close proximity of each other and fall within the same boundary width. For example, a northbound and southbound highway running alongside each other.

Continuing linear assets

Assets that connect to each other at their start points and end points. When you reach the end point of one asset, you automatically transition into the start point of

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

another asset. For example, a highway that changes into another highway after a specific point.

Intersecting linear assets

Assets that cross each other at a specific point. For example, two roads that cross each other at an intersection.

For more information on linear asset relationships, see Find linear asset relationships.

AI in Enterprise Asset Management

Set up, manage, and optimize your generative AI solutions on the ServiceNow AI Platform® from a single workspace.

The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

For more information, see ServiceNow product tiers.

For more information about AI capabilities in Enterprise Asset Management, see the following:

- Fulfill enterprise asset requests by using an agentic workflow
- Fulfill repair orders by using an agentic workflow
- Importing enterprise models and assets using AI assistance

For information about AI assets that are available on the ServiceNow AI Platform, see the following topics:

- Generative AI skills
- Agentic workflows

Important:

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

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

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

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 information about legal request and/or legal matter (including related field information, comments, and work notes). 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.

Indoor maps in Enterprise Asset Management

Indoor mapping provides granular location tracking to visualize asset location on a floor map.

Each indoor map consists of an interactive interface that enables you to visualize where your assets are located within your campuses, buildings, floors, and places.

You can access the indoor map from the **Asset indoor map** tab in the Enterprise asset estate view of the Enterprise Asset Workspace. You can also view indoor mapping data for a specific asset from the corresponding asset record, stockroom record, or work order task.

Location hierarchy

Locations types in indoor maps

Location type	Description
Campus	Represents a set of buildings within the same geographic location.
Building	Represents a multi-floor building within a specific campus.
Floor	Represents a floor within a specific building.
Place	Represents either a polygon or point of interest within a specific floor. Places can represent areas, rooms, desks, printers, assets, and more.

Key capabilities

- View the granular location of each asset within a specific floor or place.
- Filter the map or search for assets based on department, user, model category, and classification code.
- Track enterprise assets, consumable assets, and pallets from a single interface.
- Access real-time space utilization visualizations alongside asset location data.

Requirements

To use indoor maps in the Enterprise Asset Workspace, fulfill the following requirements:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Explicitly install the Indoor Mapping for Assets (com.sn_ima) application from the ServiceNow Store. When you install this application, Indoor Mapping (sn_map_core) and Indoor Mapping component (sn_map_component) are also installed.

   Note: If you purchased an Enterprise Asset Management license after November 3, 2023 using the updated Enterprise Asset Management SKU (PROD21613), you can install the Indoor Mapping for Assets (com.sn_ima) application.

2. Set the *com.sn_eam.indoormap.enabled* asset parameter to **true** on your ServiceNow instance.
3. Set up your indoor maps using Map Studio.

   For more information, see Configure Indoor Mapping.

   Note: When you install indoor maps using the entitlement to the Enterprise Asset Management license, you can use only PNG floor map files in Map Studio. You cannot import files in AutoCAD or Raster file format. To use AutoCAD or Raster files, you must have entitlement to the Workplace Service Delivery application.

4. Configure the option to display the **Asset indoor map** tab in the Enterprise asset estate view of the Enterprise Asset Workspace.

   For detailed instructions, see Configure tabs in the Enterprise Asset Workspace.

   Note: This tab appears only if the **Include in tab** option is enabled in the Asset indoor map tab configuration.

5. Synchronize location data.

   Note: For indoor maps to show assets in the Enterprise Asset Workspace, assets must be assigned to a location of the type **place** or **room** in the Location [cmn_location] table. To view newly created locations within the Enterprise Asset Management application, synchronize the locations from Map Studio to the Location [cmn_location] table. You can associate the locations created in Map Studio with pre-existing records or new records in the Location [cmn_location] table. For more information, see Synchronize Indoor Mapping map data with CMN location.

For more details on using indoor maps, see Track assets using indoor maps in the Enterprise Asset Workspace.

Mobile Agent application for Enterprise Asset Management

You can use the ServiceNow® Mobile Agent application to create, update, and view your enterprise assets. You can also use the application to scan enterprise assets for inventory audits and to complete verifications and departures for asset disposals.

The ServiceNow Mobile Agent application is supported on both iOS and Android devices. You can download the application from the Apple App Store or Google Play Store.

See Mobile Agent app for more information on the Mobile Agent application.

Related topics

Managing enterprise assets and tasks using the Mobile Agent application

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configuring Enterprise Asset Management

Configure the Enterprise Asset Management application to manage the life cycle of your enterprise connected and non connected assets.

Configuration overview

Configuration of the Enterprise Asset Management application by system administrators involves performing the following tasks. Depending on your organization's needs and requirements, some configuration tasks are optional.

Enterprise Asset Management configuration

Task	Required/optional	Resource
Install the Enterprise Asset Management application	Required to use the Enterprise Asset Management application.	Installing Enterprise Asset Management Enterprise Asset Workspace
Install the Enterprise Asset Management for Healthcare application	Optional. This application provides functionalities, features, and workflows of Enterprise Asset Management that support healthcare-related roles and asset models	Installing Enterprise Asset Management for Healthcare
Install the OT Asset Management application	Optional. This application helps you to manage assets of the Industrial model category for Operational Technology.	Installing OT Asset Management
Install the Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) application	Optional. This application provides the functionalities, features, and workflows of Enterprise Asset Management but for mission-critical facility-based enterprise assets and linear assets only.	Installing Enterprise Asset Management for Data Center and Network Asset Management (DCNAM)
Install the Enterprise Asset Management for Providers application	Optional. This application adds DaaS provider-based functionalities and workflows to the base Enterprise Asset Management application	Installing Enterprise Asset Management for Providers
Install the EAM Demo Data application	Optional. This application provides demo data for the Enterprise Asset Management application.	Install EAM Demo Data
Configure and activate agentic workflows	Optional. This task enables you to configure and activate any agentic workflows that you want to use in the Enterprise Asset Management application.	Configure and activate agentic workflows for Enterprise Asset Management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise Asset Management configuration (continued)

Task	Required/optional	Resource
Manage tabs that appear in the Enterprise Asset Workspace	Optional. This task enables you to hide or display various tabs in the Enterprise Asset Workspace.	Configure tabs in the Enterprise Asset Workspace
Create model categories	Optional. This task enables you to create model categories that are not already included in the Enterprise Asset Management application.	Create model categories
Configure classification codes	Optional. These tasks enable you to configure and manage classification codes for your enterprise models.	Create a source for classification codes Import classification codes Create a classification code
Configure failure and resolution codes	Optional. These tasks enable you to configure and manage failure and resolution codes for asset maintenance.	Manage failure and resolution codes
Create sites for asset groups	Optional. This task enables you to create sites for your asset groups.	Create a site in the Enterprise Asset Management application
Create linear asset types	Optional. This task enables you to create linear asset types that are not already included in the Enterprise Asset Management application.	Create linear asset types
Create stockroom types	Optional. This task enables you to create stockroom types that are not already included in the Enterprise Asset Management application.	Create a stockroom type for enterprise assets
Map roles to enterprise classes	Optional. This task enables you to map Enterprise Asset Management roles to enterprise model and asset classes.	Map enterprise roles to enterprise classes
Configure calibration settings	Optional. These tasks enable you to configure and manage various settings for your enterprise asset calibrations.	Create a calibration category for your enterprise asset calibrations Create a quality standard for your enterprise asset calibrations

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise Asset Management configuration (continued)

Task	Required/optional	Resource
		Create a service frequency for your enterprise asset calibrations Create a calibration attribute library
Configure asset Total Cost of Ownership (TCO)	Optional. These tasks enable you to configure and manage your enterprise asset TCO.	Total Cost of Ownership (TCO) for enterprise assets
Configure risk settings	Optional. These tasks enable you to configure and manage various settings that help you track and monitor your enterprise asset risks.	Managing risk in Enterprise Asset Management
Configure key performance indicator (KPI) settings	Optional. These tasks enable you to configure and manage various settings that help you track and monitor your enterprise asset KPIs.	Configuring settings to monitor asset key performance indicators (KPIs) in the Enterprise Asset Workspace
Configure shipping	Optional. These tasks enable you to configure and manage your enterprise asset shipments.	Managing enterprise asset shipments
Create knowledge articles	Optional. This task enables you to create knowledge articles about the Enterprise Asset Management application.	Create a knowledge article for Enterprise Asset Management
Integrate Google Maps with linear assets	Optional. This task enables you to configure and manage integrations between Google Maps and linear asset geo maps.	Configure Google Maps to integrate with linear assets
Opt-in to the Enterprise Asset Management Content Service	Optional. This task enables your organization to share unnormalized enterprise model data with ServiceNow to improve the normalization process,	Opt-in to the Enterprise Asset Management Content Service Enterprise Asset Management normalization
Edit Field Service Management settings for the Work management view	Optional. This task enables you to modify your Field Service Management configurations so that you can access the Work management view.	Edit Field Service Management configurations for the Work management view

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Installing Enterprise Asset Management

Install the Enterprise Asset Management application so that you can manage the life cycles of your enterprise connected and non connected assets. You can install the application from either the ServiceNow® Store or the Admin Home page.

Install Enterprise Asset Management from the ServiceNow® Store

You can install the Enterprise Asset Management application (com.sn_eam) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

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

Role required: admin

About this task

The following items are installed with Enterprise Asset Management:

- Plugins
- Store applications
- Roles

For more information, see Components installed with Enterprise Asset Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Enterprise Asset Management application (com.sn_eam) using the filter criteria and search bar.

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

   A list of the versions available to you 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**.

Install Enterprise Asset Management from the Admin Home page

You can install the Enterprise Asset Management application (com.sn_eam) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

The following items are installed with Enterprise Asset Management:

- Plugins
- Store applications
- Roles

For more information, see Components installed with Enterprise Asset Management.

Procedure

1. Open the Admin Home page.
   The Admin Home page is the first page that opens when you log in to your ServiceNow instance. To navigate back to the Admin Home page from any other page, use one of the following options:
   - From the header of your ServiceNow instance, navigate to **Admin** > **Admin Home**. The Admin Home page launches in a new browser tab.
   - On the header of your ServiceNow instance, select the ServiceNow logo.
2. In the Manage your products section of the Admin Home page, select **View product overview** on the **Enterprise Asset Management** card.

   Note: The Admin Home page displays cards for only the applications that you're entitled to.

   The Product Hub opens.
3. In the Apps and plugins section of the Product Hub, select the **Not installed** tab.
4. Locate the **Enterprise Asset Management** card and then select the installation icon.

Result

After the application is installed successfully, the card moves from the **Not installed** tab to the **Installed** tab. You can view additional details about the application, including the application version, release compatibility, and dependencies, by selecting the Open Application Manager icon on the card.

Install EAM Demo Data

You can install the EAM Demo Data application (com.sn_eam_demo_data) if you have the admin role. The application includes demo data for the Enterprise Asset Management application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Warning:

Do not install the EAM Demo Data application in any production environments, as it can cause data loss and corruption. The application is intended for internal use only.

Please consult with your account manager prior to installing the application. If you install the application without prior consent, ServiceNow is not responsible for any data loss or corruption that may occur.

- Review the EAM Demo Data application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Install the Enterprise Asset Management (com.sn_eam) application or one of the following Enterprise Asset Management-dependent applications on your ServiceNow instance:

  Note: For instructions on how to install the Enterprise Asset Management application, see Install Enterprise Asset Management from the ServiceNow Store.

  - OT Asset Management (com.sn_otam)

    For instructions on how to install this application, see Install OT Asset Management from the ServiceNow Store.

  - Enterprise Asset Management for Healthcare (com.sn_eamhc)

    For instructions on how to install this application, see Install Enterprise Asset Management for Healthcare from the ServiceNow Store.

  - Enterprise Asset Management for Facilities (com.sn_eamfam)
  - Enterprise Asset Management for Data Center and Network Asset Management (com.sn_eam_dcnam)

    For instructions on how to install this application, see Install Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) from the ServiceNow Store.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the EAM Demo Data application (com.sn_eam_demo_data) using the filter criteria and search bar.

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

   A list of the versions available to you 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.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select the **Load demo data** check box.
6. Select **Install**.

Configure and activate agentic workflows for Enterprise Asset Management

Configure and activate the agentic workflows that you want to use in the Enterprise Asset Workspace.

Before you begin

Role required: sn.aia_admin role or an appropriate role that is defined in your security controls

Procedure

1. If you want to use a customized agentic workflow, configure it through one of the following options:
   - Create a new workflow and configure the settings according to your requirements.

     For detailed instructions, see Create an agentic workflow.
   - Duplicate an existing workflow and adjust the settings according to your requirements.

     For detailed instructions, see Duplicate an agentic workflow.
   - Modify an existing workflow according to your requirements.

     For detailed instructions, see Modify an agentic workflow.

   Note: If you want to run an existing agentic workflow as is, skip this step and proceed directly to step 3.
2. Test the customized agentic workflow to analyze its performance while it executes the instructions that you have defined.
   - To test the agentic workflow manually, see Manually test the execution of an agentic workflow.
   - To test the agentic workflow automatically against various execution log datasets, see Execute an agentic evaluation run.
3. Activate the trigger to invoke the agentic workflow automatically.
   For detailed instructions, see Activate an agentic workflow template.

   Note: If you do not activate the trigger, you must invoke the agentic workflow manually.

Configure tabs in the Enterprise Asset Workspace

Configure the options to hide or display various tabs, including tabs that are associated with specific model categories, in the Enterprise model management view and Enterprise asset estate view of the Enterprise Asset Workspace.

Before you begin

Role required: sn_eam.enterprise_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Model and asset tabs**.
4. From the list of available tab configurations, select the configuration that you want to modify. The Enterprise Asset Management application includes the following tab configurations by default:
   - Asset groups tab configuration
   - Asset indoor map tab configuration
   - Construction class tab configuration
   - Enterprise class tab configuration
   - Facilities class tab configuration
   - Firmware class tab configuration
   - Industrial class tab configuration
   - Linear assets tab configuration
   - Medical class tab configuration
   - Retail class tab configuration
   - Tactical Equipment class tab configuration
   - Transportation class tab configuration
   - Wearables class tab configuration
   - Multimedia Production Equipment class tab configuration

   Important:

   You can also select **New** to create an additional tab configuration for any custom top tier model category that you have added under the enterprise model category. However, ServiceNow strongly recommends that you use only existing top tier model categories, such as Medical or Construction, with custom sub-categories instead. For more information on creating custom model categories, see Create model categories.

   If you choose to create an additional tab configuration, you must also use UI Builder to manually add the corresponding model and asset tabs to the Enterprise model management view and Enterprise asset estate view. For detailed instructions, see Add tabbed content to UI Builder pages.
5. On the tab configuration record, modify the fields as needed.

Tab configuration fields

Field	Description
Name	Name of the tab configuration.
Model category	Model category that is associated with the tab configuration. The specified model category corresponds with a model tab in the Enterprise model management view and an asset tab in the Enterprise asset estate view. **Note:** This field is editable only if you are creating a tab configuration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Include in tab	Option to display the given tab in the Enterprise model management view or Enterprise asset estate view. If you enable this option, the tab appears in the applicable views. If you disable this option, the tab no longer appears in the applicable views. For example, if you enable this option in the Retail class tab configuration, the **Retail** tab appears in both the Enterprise model management view and Enterprise asset estate view. ⚠ **Warning:** If you enable the **Include in tab** option but disable the **Include in dialog box** option, the resulting tab configuration is invalid.
Include in dialog box	Option to display the associated model category in the dialog boxes for creating enterprise models and assets. If you enable this option, the model category appears in the **Model category** drop-down list of these dialog boxes. If you disable this option, the model category no longer appears in the drop-down list. You can access these dialog boxes by navigating to either the Enterprise model management view or Enterprise asset estate view, selecting the **All enterprise** tab, and then selecting **New**. ⓘ **Note:** This option is editable only for tab configurations that are associated with a model category, such as the Tactical Equipment class tab configuration. ⚠ **Warning:** If you enable the **Include in tab** option but disable the **Include in dialog box** option, the resulting tab configuration is considered invalid.
Domain	Domain that the tab configuration is available in.

6. Select **Save**.

Create model categories

You can create model categories for the Enterprise Asset Management application.

Before you begin

Various base model categories are already available for you to choose from.

Keep the following in mind while creating model categories:

- When you create a configuration item (CI) class in the Configuration Management Database (CMDB), you can also create a corresponding model category to associate that CI class with. By associating a CI class with a model category, you can then associate that CI class with the corresponding asset and product model classes.
- If you associate a CI class with a model category that is already associated with an asset class, the asset and CI synchronization capability automatically triggers, creating assets for all CIs under the given CI class. If an asset is not created automatically, you can create it manually.
- The **Allow pre-allocated**, **Allow in bundle**, and **Allow as main** options are available only if the model category is associated with an asset class.

  ⓘ **Note:** These options are not applicable to enterprise model categories.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Model categories**.
4. Select **New**.
   The Create New Model Category page appears.
5. On the form, fill in the fields.

Create New Model Category form

Field	Description
Name	Display name of the model category in the Service Catalog.
Parent category	Parent model category that this model category falls under.
UNSPSC code	United Nations Standard Products and Services Code (UNSPSC) for all products under the model category.
Picture or icon	Visual representation of the model category in the Service Catalog.
CI class	CMDB CI class that you want to associate with the model category. **Important:** You can select a CI class only when you are creating the model category. You can't select one after you have created the model category.
Product model class	Product model class that you want to associate the model category with.
Asset class	Asset class that you want to associate the model category with. You can select a default asset class, such as **Enterprise Asset**, or any new asset class that you have created. If you select **Consumable** or **Software License**, the **CI class** field becomes read-only since consumables and software licenses do not create CIs. If you specify a CI class and then select **Consumable** or **Software License**, the**CI class** field automatically changes to **None**. **Important:** You can select an asset class after you have created the model category, but you can't change it after it has been selected. After you associate the model category with an asset class, the Enterprise Asset Management application can automatically create assets based on the given model category.
Allow pre-allocation	Option to allow items under this model category to be added and tracked as pre-allocated assets.
Allow in bundle	Option to allow items under this model category to be used in bundles.
Allow as main	Option to allow items under this model category to be used as the main component in a bundle.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Is product instance	Option that indicates if you are using a product instance to identify and synchronize the assets, CIs, and install base items (IBIs) under this model category.
Enforce CI verification	Option to prevent the Enterprise Asset Management application from automatically creating assets for a specific model category when CIs are added manually or found through Discovery. This option enables you to review and verify new CIs before adding them as assets.

6. Select **Save**.

Result
The model category is created. You can perform additional configurations on the model category by entering details in the **Product Models** tab.

Create a source for classification codes

Create a source that you can then assign to classification codes.

Before you begin
A source is a system of classification for a particular industry. For more details on sources, see Model classification.

Role required: sn_eam.enterprise_asset_manager

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Model classifications** > **Sources**.
4. Select **New**.
5. On the Create New Enterprise model classification source page, enter a name of the source in the **Source** field.
6. Enter a description of the source in the **Description** field.
7. Select **Save**.
   The source appears in the Create sources page.

Create a classification code

Create a classification code and assign it to enterprise models and model categories to increase the efficiency of enterprise models.

Before you begin
Each classification code is assigned to one or many model categories. Classification codes are stored in the Enterprise model classification [sn_ent_model_classification] table.

Role required: sn_eam.enterprise_admin

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. From the navigation panel of the Admin center view, navigate to **Model classifications** > **Classifications**.
4. Select **New**.
5. On the form, fill in the details.

Create New Enterprise model classification form

Field	Description
Classification	The display name of the classification code record which is automatically generated after the record is saved. The display name is a concatenation of the classification code, its description, and the source.
Code	The classification code. Based on your data infrastructure, the code may adhere to a hierarchical structure.
Description	Description of the classification code.
Parent	Parent of the classification code. If you select a parent, the model categories assigned to the parent code are automatically populated in the **Model categories** field. This field is however editable. You can delete a model category that is automatically populated or you can add another model category.
Source	The source system that a classification code is based on. For example, OmniClass is a classification system for the construction industry.
Model categories	Mode categories assigned to the code.

6. Select **Save**.
   The display name of the classification code is generated and displayed in the **Classification** field. The display name represents the code, the description, and the source. You can view the new classification code record in the Classifications list view page.

Import classification codes

Import multiple classification codes at one go to your ServiceNow instance.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. From the navigation panel of the Admin center view, navigate to **Model classifications** > **Import**.
4. Select **New**.
5. On the Create New Enterprise Classification Import page, enter a name for the import in the **Import** field.
6. Select **Download template** to download a spreadsheet.
7. Enter the details in the spreadsheet.
   Ensure that you fill out either the Code or the Description column in the spreadsheet. Use commas to specify more than one model category in the Model categories column.
8. Select **Attach File** to upload the spreadsheet (.xlsx).
9. Select **Import** to perform a validation check on the spreadsheet.
   After you select Import, the Status field changes from **Draft** and moves to **Pending**, **Uploading**, **Transforming**. After the import process is completed, the status changes to either **Completed**, **Completed with errors**, or **Failed**. The details of the import process are displayed in the **Enterprise Classification Import** and **Classification import results** sections.
10. Select the **Classification Import Stagings** related list to view the details of the spreadsheet that you uploaded and also view any errors you received.
11. Open any record for which you got an error.
12. Fix the error, upload the spreadsheet, and import the record again.

Manage failure and resolution codes

Enhance maintenance efficiency with standardized and predefined failure and resolution codes.

Failure codes are used to identify the exact reason an asset has failed, while resolution codes specify the method used to resolve the issue.

Benefits of failure and resolution codes

- The predefined codes help in consistent reporting, analysis, and tracking of issues and their resolutions.
- The hierarchical structure of the codes, with each code having a parent-child relationship, offers a detailed and organized approach to maintenance.
- The **Failure code** and **Resolution code** fields in the Repair flow task forms help asset technicians to record the reason for failure of an asset and the resolution used for its repair.

Hierarchy of codes

A code can have a parent and a path. For example, Major engine failure can be a parent failure code, with child codes like Engine oil dried out or Carburetor broken down.

When a code is created, its path is generated by tracing back to the root code. For example:

- For Code A that doesn't have any parents, the path is Code A.
- For Code B that has a parent Code A, the path is Code A, Code B.
- For Code C that has a parent Code B, the path is Code A, Code B, Code C.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The parent code is of the same type as the child code. For example, the parent of a failure code is another failure code, and the same applies to resolution codes. If the parent changes, the path of the children is automatically updated. A failure code or resolution code can be linked to only one parent code.

Work with failure and resolution codes

As an enterprise administrator or inventory administrator, you can perform the following actions in the Admin center:

- Create a source for failure and resolution codes.
- Create failure and resolution codes.
- Import failure and resolution codes through Excel template.

As an inventory user or enterprise asset technician, you can perform the following actions:

- View the available failure and resolution codes by navigating to **Workspaces** > **Enterprise Workspace** > **Admin center** > **Failure and resolution** and selecting the **Codes** list.
- View the sources for failure and resolution codes by navigating to **Workspaces** > **Enterprise Workspace** > **Admin center** > **Failure and resolution** and selecting the **Sources** list.
- Select the failure and resolution codes in the Repair flow task forms. For more details, see Troubleshoot assets requested for repair in the Enterprise Asset Workspace and Complete the repair asset task in the Enterprise Asset Workspace.

Create a source for failure and resolution codes

Create a source to be associated with any failure or resolution code. The source for a code could be internal, external, or even from a manufacturer.

Before you begin

Role required: sn_eam.enterprise_admin or inventory_admin

About this task

You should have at least one source before creating failure or resolution codes.

Note: Sources of the codes are stored in the Asset service source [sn_ent_asset_service_source] table.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Failure and resolution** > **Sources**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Asset service source form

Field	Description
Source	Name of the source. For example, `External` or `Internal`.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Description	Brief description of the source.

6. Select **Save**.

Result
The source that you created is shown in the Sources list.

Create a failure or resolution code

Create a failure or resolution code to help enterprise asset technicians identify either the asset failure or the solution to the asset problem.

Before you begin
The source for the code that you want to create should already be available. For more details, see Create a source for failure and resolution codes.

Role required: sn_eam.enterprise_admin or inventory_admin

About this task
Failure and resolution codes are stored in the Asset service source [Asset service code] table.

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Failure and resolution** > **Codes**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Asset service code form

Field	Description
Display name	Name of the code that's automatically generated based on the values in the **Code** and the **Description** fields when the code is created. For example, if the **Code** field has a value F1001 and the **Description** field is Power failure, then the Display name is F1001-Power failure.
Code	Unique identifier used to identify an asset failure or the solution to it. For example, `F1001` or `R1001`.
Description	Brief description that explains what the code signifies. For example, `Power failure`.
Type	Type of code. The following values are available: ○ **Failure** ○ **Resolution**
Parent	Code of the parent. **Note:** The parent code is of the same type as the child code. For example, the parent of a failure code is another failure code, and the same applies to resolution codes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Model categories	Model categories to which the code can be applied. **Note:** When you select a parent on the code, the model category is inherited from the parent code. However, you can still update the this field. If you don't select any model category, the code applies to all model categories.
Source	Source of the code. This field is required.

6. Select **Save**.

Result
The code that you created is shown in the Codes list.

Import failure and resolution codes in bulk

Import multiple failure and resolution codes via Excel templates in the Admin center to assist enterprise asset technicians in diagnosing asset issues and their resolutions.

Before you begin
The source for the codes that you want to import should already be available. For more details, see Create a source for failure and resolution codes.

Role required: sn_eam.enterprise_admin or inventory_admin

About this task

Note: The import records are stored in the Asset service import [sn_itam_common_asset_service_import] table.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Failure and resolution** > **Import**.
4. Create an asset service import.
   a. Select **New**.
   b. Download, update, and save the code import template.
      i. Select **Download Template**.
      ii. Fill in the template with the details of the codes.

      The template has the following fields:

      - **Code**: A unique identifier used to identify an asset failure or the solution to it. For example, `F1001` or `R1001`. This field is required to import the template.
      - **Description**: A brief description that explains what the code signifies. For example, `Power failure`.
      - **Type**: Type of code. You can either specify `Failure` or `Resolution` in this field. This field is required to import the template.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Parent code**: Code of the parent.

  Note: The parent code is of the same type as the child code. For example, the parent of a failure code is another failure code, and the same applies to resolution codes.

- **Model categories**: Model categories to which the code can be applied.

  Note: When you select a parent on the code, the model category is inherited from the parent code. However, you can still update this field.

  If you don't specify any model category, the code applies to all model categories.

- **Source**: Source of the code.

iii. Save the template.

c. On the Create New Asset service import form, fill in the details.

i. In the **Name** field, provide a name for the asset service import.

ii. Select **Attach file** and then select the code import template that you created in step b.

5. Select **Import**.

Result

- The Code import result section shows the following details:
  - Code rows
  - Code inserts
  - Code ignored
  - Code skipped
  - Code errors
- If the import is successful, the Status of the asset import changes from **Draft** to **Completed**.
- If there are no issues with the template, all the codes that you imported are shown in the Codes list.

Create a site in the Enterprise Asset Management application

Create a site for asset groups in the Enterprise Asset Management application.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

For detailed information on what sites are and how are they used in asset groups, see Asset groups in Enterprise Asset Management.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Site configuration**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Select **New**.
5. On the form, fill in the fields.

Create New Equipment Model Entity form

Field	Description
Entity name	Name of the equipment model entity.
Short code	Short code that is assigned to this equipment model entity.
Parent	Parent of the entity. Once a parent is selected, the **Template** field is automatically populated
Path	Auto-generated based on the short code and the hierarchy.
Template	The template that defines the hierarchy of the parent according to the ISA-95 hierarchical entity model.
Location	Location of the equipment model entity. For example, Atlanta Building 64 would be the location for each associated equipment model that is located there.
Level	The hierarchical levels of a site with site being at the highest level, followed by area, work center, and work unit.
Site	Refers to an ISA-95 hierarchical entity model. Sites are entity records in the Equipment Model Entity [cmdb_ci_ot_isa_entity] table, organized in a hierarchical structure.
Company	Name of the company that this entity belongs to.
Business Unit	Business unit of the company that this entity belongs to.
Short Description	A description of the site entity.
Assigned to	The person primarily responsible for the entity.
Support group	The group to contact if you encounter any issues with the entity.
Managed by	Name of the assigned person who owns and is responsible for managing this entity.
Managed by group	The group who maintains the entity.
Process criticality	Measure of how critical, or important, the equipment model entity is to the process. Select the process criticality for the entity. For example: ○ 1 - most critical. ○ 2 - somewhat critical.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Operational status	Current operational status of the entity: ○ **Operational**: Entity that is fully operational in the production process. ○ **Non-Operational**: Entity that is non-operational in the production process.

6. Select **Save**.
   The newly created site appears in the Sites tab.

Create linear asset types

Create linear asset types to categorize linear assets.

Before you begin

The following predefined linear asset types are already part of the base system:

- Railroad
- Roadway
- Sewer
- Sidewalk
- Utility cable
- Trail

Follow these steps to create customized linear asset types.

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Linear asset types**.
4. Select **New**.
5. Enter a name for the linear asset type in the **Name** field.
6. Select a parent for the linear asset type from the **Parent** list.
7. Select **Save**.
   The new linear asset type appears in the Linear asset types related list. If you don't see it in the related list, select the Refresh List icon on the right side of the page.

Create a stockroom type for enterprise assets

If the base system stockroom types don't meet your needs, you can create a custom stockroom type in the Enterprise Asset Workspace.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterptrise_asset_manager

About this task

Stockroom types are categories of stockrooms. For detailed information on stockroom types, see Stockroom types.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Stockroom types**.
4. Select **New**.
5. On the form, fill in the details.

Field	Description
Name	Display name of the stockroom type.
Description	General information about the stockroom type.
Priority	Level of precedence for this type of stockroom.
Value	Internal identifier of the stockroom type.
Shipment required	Option that determines if stockrooms of this type require shipment by default.
External stockroom	Indicates if stockrooms of this type are managed internally (check box cleared) or managed externally by a third party (check box selected).

6. Select **Save**.
   The newly created stockroom type appears in the **Stockroom types** tab.

Map enterprise roles to enterprise classes

Gain additional access to model categories by mapping individual enterprise roles to additional enterprise classes.

Before you begin
Role required: sn_eam.enterprise_admin

About this task
To map enterprise roles to enterprise classes, you need to first provide roles access to the classes and then expose the tabs associated with those classes in the designated workspace.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Roles-to-class access**.
4. Select the role record that you want o configure.
   The respective class access rules page opens. For example, if you select the Facility asset technician enterprise class access rules record, the Facility asset technician enterprise class access rules page opens.
5. Select a model category from the **Additional model categories** list.
   The classes related to the model category appear in the **Class names**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select **Save**.
   The role is now assigned to the classes that you selected. You need to now expose the model and asset tabs related to these classes by navigating to the Model and asset tabs in the Admin center.
7. Select Model and asset tabs in the Admin center.
8. Select the model category name, that you assigned to the role, to open the class tab configuration page.
9. Select **Include in tab** and **Include in dialog box**.
10. Select **Save**.
    Role access is granted to the additional classes and the model and asset tabs associated with those classes are automatically visible in the specific workspace. Additionally, all dashboards are updated with data pertaining to the classes that you configured.

Create a calibration category for your enterprise asset calibrations

Create a calibration category to indicate the type of calibration that you need to perform on your enterprise assets.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

You can specify the calibrations that are required for your enterprise assets by using calibration attributes. When you create a calibration attribute, you must select a calibration category to indicate the type of calibration that you need to perform. The Enterprise Asset Management application includes default calibration categories such as Electrical, Flow, Humidity, and Pressure. You can create additional calibration categories for any calibrations that do not fall under the default categories.

For more details on calibration attributes, see Add calibration attributes to an enterprise asset or Add calibration attributes to an enterprise model.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Calibration configuration** > **Category**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Category form

Field	Description
Name	Name of the calibration category.
Description	Detailed description of the calibration category.

6. Select **Save**.

Result

The calibration category is available to use in your calibration attributes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a quality standard for your enterprise asset calibrations

Create a quality standard to indicate the requirements and guidelines that you must follow while performing your enterprise asset calibrations.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

You can specify the calibrations that are required for your enterprise assets by using calibration attributes. When you create a calibration attribute, you can apply a quality standard to indicate the set of requirements and guidelines that you must follow during the associated calibrations. By following a quality standard, you can achieve consistent, reliable, and accurate calibrations across your deployment.

For more details on calibration attributes, see Add calibration attributes to an enterprise asset or Add calibration attributes to an enterprise model.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Calibration configuration** > **Quality standard**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Quality Standard form

Field	Description
Name	Name of the quality standard.
Short description	Brief description of the quality standard.
Valid from	Date from which the quality standard is valid.
Valid to	Date on which the quality standard is no longer valid.
Description	Detailed description of the quality standard.

6. Select **Save**.

Result

The quality standard is available to apply to your calibration attributes.

Create a service frequency for your enterprise asset calibrations

Create a service frequency to specify how often you must perform an enterprise asset calibration.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

You can specify the calibrations that are required for your enterprise assets by using calibration attributes. When you create a calibration attribute, you must specify the frequency at which you need to perform the associated calibrations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more details on calibration attributes, see Add calibration attributes to an enterprise asset or Add calibration attributes to an enterprise model.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Calibration configuration** > **Service frequency**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Service Frequency form

Field	Description
Name	Name of the service frequency.
Service frequency	Frequency at which you must perform the calibrations.
Service frequency type	Type of frequency.

6. Select **Save**.

Result
The service frequency is available to use in your calibration attributes.

Create a calibration attribute library

Create a library of common calibration attributes that are not associated with any enterprise models or enterprise assets. Use these attributes to define the details and requirements of your commonly used calibrations.

Before you begin
Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task
You can create common calibration attributes that are not associated with any enterprise models or enterprise assets. These calibration attributes can be cloned to any of your available enterprise models. You can also create calibration attributes for a specific enterprise model or enterprise asset. For details on how to create a calibration attribute for a specific enterprise model, see Add calibration attributes to an enterprise model. For details on how to create a calibration attribute for a specific enterprise asset, see Add calibration attributes to an enterprise asset.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Calibration configuration** > **Attribute library**.
4. Select **New**.
5. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Calibration Attribute form

Field	Description
Attribute details	
Name	Name of the calibration attribute.
Short description	Brief description of the calibration attribute.
Criticality	Criticality level that indicates how important the calibration attribute is.
Service frequency	Frequency at which you must perform the calibration.
Category	Type of calibration. **Note:** The Enterprise Asset Management application includes default calibration categories such as Electrical, Flow, Humidity, and Pressure. You can create additional calibration categories for any calibrations that do not fall under the default categories. For detailed instructions, see Create a calibration category for your enterprise asset calibrations.
Active	Option that indicates if the calibration attribute is active.
Order	Order in which the calibration attribute applies to an enterprise model after it is cloned to the model. If the enterprise model contains more than one calibration attribute, the attribute with the lowest numerical value applies to the model first.
Calibration properties	
Value type	Method by which you want to measure accuracy. Select one of the following options: ○ **Accuracy % full scale**: Accuracy is based on a fixed percentage of the enterprise asset's full measurement range. The corresponding tolerance limits remain the same regardless of which point you measure accuracy at. For example, if a measurement range is 100 units and the accuracy percentage is set to ±1%, the tolerance limits are ±1 unit at every point within the measurement range. ○ **Accuracy % point**: Accuracy is based on a fixed percentage of the specific point that you are measuring accuracy at. The corresponding tolerance limits increase or decrease proportionally based on the point that you measure accuracy at. For example, if your accuracy percentage is set to ±1% and you measure accuracy at a point that has a value of 50 units, the tolerance limits for this specific point are ±0.5 units. If you then measure accuracy at another point that has a value of 60 units, the tolerance limits increase to ±0.6 units.
Scale	Full measurement range that you can measure accuracy within.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Note: This field appears only if you set the **Value type** field to **Accuracy % full scale**.	
Unit	Unit of measurement that you are using to measure accuracy.
Accuracy (%)	Percentage of accuracy that your enterprise assets must fall within.
Resolution	Smallest distinguishable change in value that you can detect and measure. The higher the resolution is, the more specific the change in value is.
Quality standard	
Quality standard	Set of requirements and guidelines that you must follow while performing the calibrations. **Note:** You can create quality standards manually in the Admin center view of the Enterprise Asset Workspace. See Create a quality standard for your enterprise asset calibrations for detailed instructions.
Instrument	
Instrument model	Model of the instrument that you must use to perform the calibrations.
Instruction	General instructions or instrument settings that you must follow when performing the calibrations.

6. Select **Save**.
   The form closes and you are automatically redirected to the new calibration attribute record.
7. Specify the points at which you can measure accuracy.

Important: You must specify one or more points within each enterprise asset's measurement range. If you do not specify at least one point, the calibration attribute cannot be set to Active.

a. On the calibration attribute record, select **Add calibration points**.
   The Calibration points dialog box opens.

b. In the dialog box, fill in the fields.

Calibration points dialog box

Field	Description
Point name	Name of the point.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Expected value	Point value that you want to measure accuracy against.
Order	Order in which you want to use the point to measure accuracy. If your calibration attribute contains more than one point, the point with the lowest numerical value is used first.

c. To add an additional point to the calibration attribute, select the Add Content icon and then fill in the fields.
Repeat this step for each point that you want to add.

d. Select **OK**.

The dialog box closes and the points appear on the **Calibration points** tab of the calibration attribute record.

What to do next

Clone the calibration attribute to all applicable enterprise models. See Clone calibration attributes to an enterprise model for detailed instructions.

Total Cost of Ownership (TCO) for enterprise assets

You can configure your Total Cost of Ownership (TCO) to track the total cost of your assets and to enable capital planning.

During an asset's life span, assets incur costs, which include initial capital costs, costs associated with purchasing new parts, labor costs, and contract costs. TCO for an asset is the sum of all these expenses.

Benefits of TCO

- Track and analyze expenses such as procurement, maintenance, repairs, and disposal across the asset hierarchy.
- Gain better visibility and control over asset-related expenses throughout the life-cycle.
- Bench mark asset costs against similar assets and asset models to compare performance.

TCO calculation

TCO is the sum of all the expenses that occurred on the asset during its lifetime. TCO is calculated for the asset by adding the amount for all the expense lines that are created against the asset. The total cost of an asset is updated whenever an expense line is added.

Considerations while calculating TCO:

- Initial TCO includes the purchase cost coming from the expense line created when an asset record is created.
- When a new asset record is created, a new expense line is created using the cost field on the asset record.
- When the cost field is updated, the existing expense line record is also updated.
- For simple and complex assets, TCO is calculated by aggregating all the expense lines associated with the asset. Whenever a new expense line is added to the asset, the TCO reflects the updated total automatically.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For serialized assets, asset TCO is the sum of all expense lines under that asset.
- For complex assets, the cost incurred on the child is also added to the TCO of the parent asset.
- If a child asset is swapped, there will be one expense line created that is the operational cost. The capital cost of new child assets is also added to the parent TCO. The **last_used** field in the swap asset is populated and this field is used to query any expense lines created after that. The **last_used** field on the swapped out asset is populated as it goes back to the stockroom.
- The cost of child assets is part of the parent asset cost for a complex asset and thus expense lines for child assets are empty.
- If a child asset is removed, its expense lines persist and the parent TCO doesn't get affected.
- In the case of user-assembled assets, parent and child both have expense lines and the child expense line roll ups to the parent and the amount is added to the parent TCO.
- For multi-hierarchy assets, any expense line created on the child asset is referenced by a many-to-many relationship between all the parents in the hierarchy.
- Consumables are set to merge and split and so are the expense lines. Any expense lines created by task rate cards are added to the TCO. The calculation applies for simple assets. In case consumables are used as child assets, then their expense lines are rolled up to the parent. TCO won't be tracked for individual consumables.
- The value obtained by reselling assets is added as a negative cost to TCO. For leased assets that have a monthly lease payment, create expense lines on the start date of the lease for every month.
- The **Asset** field on expense lines is populated with the asset reference from the task record.
- Expense lines created after closing a work order task or an incident will have its **Asset** field populated from the asset reference on the work order task or incident.

TCO benchmark and threshold

After you specify a TCO benchmark cost, the TCO benchmark threshold is automatically calculated by multiplying the TCO Benchmark by the TCO benchmark threshold percentage. You can manually override the TCO benchmark threshold by changing the percentage in the *asset_tco_benchmark_threshold_percentage* system property.

You can manually override the TCO benchmark threshold by changing the value on the **TCO benchmark threshold** field in the Financial section of a model form.

If you update the TCO benchmark, the TCO benchmark threshold gets recalculated.

Rate cards, expense lines, and expense categories

The Enterprise Asset Management application automatically sums the time worked records and calculates the total cost by multiplying the rate cards. Rate cards are created for each task across all workflows. Rate cards capture costs on a per task basis or on the time consumed. The Enterprise Asset Management application supports the following rate cards:

- task rate cards: Cost captured by tasks.
- labor rate cards: Cost captured by the time consumed on an hourly basis. Labor rates can be defined at the user level.

Note: To use rate cards, you must activate the ServiceNow® Cost Management (com.snc.cost_management) plugin.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

By default, the task rate card is used. To change to using the labor rate card, open a task rate record and select the **Use time worked** field.

After a task is closed, an expense line is created based on the task time worked captured. An expense category is then attributed to the expense line. The expense lines amounts are added to the total cost on the asset. The expense lines appear under the Expense line related list under the asset.

Time capturing for tasks

Each task has a time capturing capability that creates time worked records for you.

You can start, record time, pause, resume, and close your tasks as described below:

1. Select **Start Work** to begin your work. This moves the status of the task from **Open** to **Work in Progress**. You can then either select **Start Timer** or **Record Time** to capture time.
   - **Start Timer**: Automatically captures time. After you select this button, the timer is initialized.
   - **Record Time**: Manually enter the time in hours, minutes, and seconds in the Record Time dialog box and select **Save** to capture the time record.
2. Select **Pause Work** to pause work. After you pause your work, the timer stops and a task work record automatically gets created in the Time Worked tab. Every time you pause your work, a task work record gets created. Based on the number of times you pause work, multiple task work records get created.
3. Select **Resume** to resume your work and restart the timer. You can also select **Close Task** to close your task.

When you select **Close task**, the time as well as the task gets closed. To arrive at the total time spent on a task, all task work record entries created for that task are added up and then multiplied with the labor rate to arrive at the total cost for a task.

TCO reports

There are two types of TCO reports; TCO comparison and TCO vs benchmark. TCO comparison reports are stacked by expense category.

Normalize TCO

Normalizing TCO refers to averaging the cost over the useful life and the asset life. The normalized calculation is for Projected TCO reports, which are only offline.

Domain separation

TCO reports support domain separation.

Upgrade considerations

If you're upgrading to Brazil, after the scheduled job **TCO Upgrade for Enterprise Assets** runs, the following updates are made:

- The **Asset** field on task records is populated on all the expense lines using the source table mentioned in the **Source ID** field. The source table defines from where the expense line has been created. Whether it's being created for a task, a configuration item, a contract, or for a purchase asset. When the scheduled job **TCO Upgrade for Enterprise Assets** runs, it searches for all task records and populates asset references from the task record to the corresponding expense line for the task. Similarly, the same scheduled job searches for all

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

configuration items (CI) and populates asset references from the CI to the corresponding expense lines.

- The **Expense category** field, introduced in Brazil, is populated based on the source of the expense line. There are several expense categories for tasks. For example, the expense lines created for a purchase asset and for a contract asset have different expense categories. Similarly, there are different expense categories for CIs too.
- The following three fields in an asset record get populated:
  - cmn_asset_tco: View this field in the Financial section in an asset record.
  - cmn_end_of_useful_life: View this field in an asset record by selecting the vertical ellipsis next to **Asset Details** and then select **Show XML**.
  - cmn_first_used: View this field in an asset record by selecting the vertical ellipsis next to **Asset Details** and then select **Show XML**.
- Any expense lines created on simple assets will be added up to asset_tco.
- For pre-assembled and user-assembled assets, any expense lines created on assets will also roll up to the parent TCO.

TCO configuration

Configuring TCO involves the following procedures:

- Create task rate cards to capture costs per task type.

  For detailed instructions, see Create a task rate card in Enterprise Asset Workspace.

- Create labor rate cards to capture costs by the time consumed on an hourly basis.

  For detailed instructions, see Create a labor rate card in Enterprise Asset Workspace.

- Create a TCO report to compare the actual or projected TCO of assets and a TCO report source.

  For detailed instructions, see Create a TCO report in Enterprise Asset Workspace.

- Create a TCO report source to add sources to a TCO report.

  For detailed instructions, see Create a TCO report source in Enterprise Asset Workspace.

- Create expense lines for closed tasks.

  For detailed instructions, see Create expense lines for closed tasks in Enterprise Asset Workspace.

Create a task rate card in Enterprise Asset Workspace

Create a task rate card to capture costs per task type in the Enterprise Asset Workspace.

Before you begin

Role required: sn_eam.enterprise_asset_manager

About this task

Task rate cards are included in the base system. Except for the **Number** field, all other fields on the default task rate cards are editable. You can't delete any of the base system task rate cards. The following steps are to create a task rate card.

To use task rate cards, you must activate the ServiceNow® Cost Management (com.snc.cost_management) plugin.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **TCO configuration** > **Task rate card**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Task Rate Card

Field	Description
Number	A unique number automatically created for each task rate card.
Name	Name of the task rate card.
Table	The table this rate card is created for.
Order	Order in which the task rate card applies to the same task. When more than one task rate card applies to the same task, the one with the lowest order is used.
Summary type	Select a summary that relates to the task rate card.
Active	Indicates if the task rate card is being used or not. By default, this check box is selected.
Short description	Short description of the task rate card.
Use time worked	By default, this check box isn't selected. This denotes that the task rate is used for capturing costs. If you want to use the labor rate option where cost is captured based on the time worked, select this check box.
Task rate	Rate of the task along with the currency code.
Default labor rate	The hourly rate to apply to the time worked entries if the worker doesn't have a labor rate card. This field appears only when the **Use time worked** check box is selected.
Set conditions	Filter to run on the table selected to determine whether this rate card applies to a given task. This field uses the Condition Count Widget to preview what records would be returned by the conditions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Description	Detailed description of the task rate card.

6. Select **Save**.
   After a task rate card is created, expense lines are created based on the value in the **Use time worked** field.

Create a labor rate card in Enterprise Asset Workspace

Create a labor rate card to capture costs by the time consumed on an hourly basis.

Before you begin

Role required: sn_eam.enterprise_asset_manager

About this task

Labor rate cards are included in the base system. Except for the **Number** field, all other fields on the default labor rate cards are editable. You can't delete any of the base system labor rate cards. The following steps are to create a labor rate card.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **TCO configuration** > **Labor rate card**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Labor Rate Card

Field	Description
Number	A unique number automatically created for each labor rate card.
Name	Name of the labor rate card.
Rate code	Code for each labor rate card.
Rate type	Standard rate type. You can add your own rate types.
Active	Indicates if the labor rate card is being used or not. By default, this check box is selected.
Short description	Short description of the labor rate card.
Hourly rate	The currency code and the cost per hour.
Set conditions	Filter to run on the table selected to determine whether this rate card applies to a given task. This field uses the Condition Count widget to preview what records would be returned by the conditions.
Description	Detailed description of the labor rate card.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select **Save**.
   After a labor rate card is created, expense lines are created based on the value in the **Use time worked** field.

Create expense lines for closed tasks in Enterprise Asset Workspace

Automatically create expense lines for previously closed tasks, that originally had no expense lines, in order to calculate costs for those tasks.

Before you begin

If you haven't used task rate cards, then expense lines do not get created. When you upgrade to Brazil, you can automatically create expense lines in bulk for all your closed tasks. This is only a one time process that runs on active task rate cards with a populated task rate value. Using time worked will not result in creation of expense lines if the time worked records are not present for tasks.

Note: To use task rate cards, you need to activate the ServiceNow® Cost Management (com.snc.cost_management) plugin.

In order to avoid creation of duplicate expense lines, keep the following factors in mind:

- Configure the task rate cards.
- Configure the conditions within each task rate card.
- Specify the amount you want to use for each task.
- Do not create duplicate task rate cards where you create multiple task rate cards for the same task and condition.

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **TCO configuration** > **Task rate card**.
4. Select **Create expense lines for tasks**.
   A confirmation message box opens.
5. Select **Create expense lines**.
   The background job **Asset Common Expense Lines for Historical tasks** runs only once and looks for closed tasks without any expense lines and creates expense lines for all those closed tasks. Once the expense lines are created, the **Create expense lines for tasks** button is no longer visible.

Configuring settings to monitor asset key performance indicators (KPIs) in the Enterprise Asset Workspace

Set up the necessary configurations in the Admin Center to enable the tracking of KPIs for your enterprise assets. These settings enable you to monitor and manage the performance your assets.

As an enterprise administrator, configure the following settings to monitor asset KPIs:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Opt in to model categories to track performance KPIs for enterprise assets.
2. Create an operational schedule for enterprise assets.
3. Map enterprise assets to an operational schedule.

For details on asset performance and the related reports, see Asset performance reports in the Enterprise Asset Workspace and Asset analytics overview for Enterprise Asset workspace.

Opt in to model categories to track performance KPIs for enterprise assets

Monitor the performance KPIs of enterprise assets in your organization by enabling the KPI tracking for the models to which the assets belong.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **KPI configuration** > **KPI opt in**.
4. From the list of model categories, select the one for which you want to enable the KPI tracking.
5. On the Asset performance tracking form, select the **Track performance KPI** check box.
6. Select **Save**.

What to do next

Create an operational schedule for enterprise assets.

Create an operational schedule for enterprise assets

Define the scheduled operational time, which is the duration during which the asset will be in use, by creating an operational schedule.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

An operational schedule record is stored in the Asset schedule [sn_itam_common_asset_schedule] table. If an operational schedule isn't defined, the Default operation schedule (24/7) hours is applied.

Note: The calculation of asset key performance indicators (KPIs) begins when the asset first moves to the In Use state. Therefore, the linked operational schedule must cover the entire period for accurate results.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **KPI configuration** > **Operational schedules**.
4. Select **New**.
5. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Operation schedule form

Field	Description
Name	Unique name for the operational schedule.
Parent	Parent schedule that constraints the new schedule. For more details, see Parent and child schedules.
Time zone	Time zone for the schedule. If you select **Floating**, the time zone is relative to whatever process is accessing the item at the time. ○ For example, if an enterprise administrator in Amsterdam sets a floating schedule for 8:00A.M. to 5:00P.M., a user in San Jose sees the schedule as 8:00 A.M. to 5:00 P.M. ○ When a schedule is defined in a specific time zone, users in different time zones see the schedule with their own time zone applied.
Description	Description of the operational schedule.

6. Select **Save**.
7. Add one or more schedule entries to the operational schedule.
   a. Select the **Schedule Entries** tab.
   b. Select **New**.
   c. On the Schedule Entry New record, fill in the fields.

      For details on Schedule Entry New record fields, see Schedule entry fields.
   d. Select **Submit**.

   A schedule entry is created and listed under the Schedule Entries tab.

   Note:

   You can't edit a schedule or its entries. If you want to stop using an asset schedule, you can deactivate it by deselecting the **Active** check box. You can then create a schedule as needed.

8. **Optional:** To view the calendar view of the schedule with the schedule entries, select **Show schedule**.

What to do next

Map enterprise assets to an operational schedule.

Map enterprise assets to an operational schedule

Create an asset schedule to map the enterprise assets to an operation schedule.

Before you begin

Role required: sn_eam.enterprise_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

An asset schedule record is stored in the Asset schedule policy [sn_asset_cmn_schdule_policy] table.

Note: If an asset isn't associated with an operational schedule, the Default asset schedule (24 hours, 7 days a week or 24/7) will be applied.

The *Asset performance - Map schedule policies* job runs weekly to sync the mapping between assets and the operational schedule.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **KPI configuration** > **Asset schedules**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Asset schedule form

Field	Description
Name	Unique name for the asset schedule.
Source table	Source table for the assets. You can select any of the following tables: ○ Enterprise asset [sn_ent_asset] ○ Construction asset [sn_ent_construction_asset] ○ Facility asset [sn_ent_facility_asset] ○ Industrial asset [sn_ent_industrial_asset] ○ Linear asset [sn_eam_linear_asset] ○ Medical asset [sn_ent_medical_asset] ○ Retail asset [sn_ent_reatail_asset] ○ Tactical equipment asset [sn_ent_tactical_asset] ○ Transportation asset [sn_ent_transportation_asset] ○ Wearable asset [sn_ent_wearable_asset] ○ Hardware [alm_hardware]
Condition	Set a condition to select the assets that you want to associate with the operational schedule. For example, if you set the **Department** field to **IT**, the operational schedule is inked to all assets within the IT department. **Note:** Select the source table before setting the condition.
Schedule	Operational schedule that you want to associate with the assets.
Priority	Order in which schedules should be applied to an asset when there are overlapping schedules.
Active	Indicates whether the asset schedule is active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select **Save**.
7. **Optional:** To sync the mapping between the assets and the operational schedules on demand, select **Sync KPI records**.

Managing risk in Enterprise Asset Management

Manage risk in the Enterprise Asset Management application by creating configuration values for risk likelihood, risk impact, and risk scores.

Assets associated to a model inherit the risk score values of the model. However, you can override the model risk scores by defining risk scores for the assets that are different from the risk score values specified on the model.

Access the Risk modules for the Enterprise Asset Management application by navigating to **Asset** > **Enterprise Risk Configuration**. Use the following modules to enter configuration values for likelihood, impact, and score.

- **Risk Likelihood**
- **Risk Impact**
- **Risk Score**

Note: For details on configuring values for likelihood, impact, and score, see Create configuration values for risk likelihood, Create configuration values for risk impact, or Create configuration values for risk scores.

After you've configured the values in the Risk modules and frozen them, the heat maps are rendered on the following views on the Enterprise Asset Workspace:

- Enterprise asset estate view: heat map for asset scores
- Enterprise model management view: heat map for model risk scores.

If a model is no longer in the **Build** stage and you update the Model's risk scores, you can propagate the updated values to the associated assets using the **Update risk** button on the model form. On clicking this button, the *`EAM - Update model risk values to asset`* scheduled job runs and updates the risk values for all the assets associated with this model.

Note: If the model is in the **Build** stage, the **Update risk** button doesn't appear.

Create configuration values for risk likelihood

Use the Risk Likelihood module to create configuration values for the likelihood vector.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Risk configuration** > **Risk likelihood**.
4. Select **New**.
5. Enter a label in the Enterprise Risk Likelihood Configuration page.
   The **Value** field is an incremental field and cannot be edited.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select **Submit**.
   The **Display Name** field is automatically populated and is a concatenation of the value and the label. For example, if 1 is the value and Low is the label, the **Display Name** field appears as `1 - Low`.
7. To add more configuration values, repeat steps 2-4.
   There should be a minimum of three likelihood records and a maximum of ten.
8. Select **Freeze** after you have added the configuration records.
9. Select **OK** in the warning message box to continue freezing your configuration records.

> **Note:** You cannot add or delete any likelihood configuration records after you select **Freeze**. You can however edit the **Label** field in the existing records.

Create configuration values for risk impact

Use the Risk Impact module to create configuration values for the impact vector.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Risk configuration** > **Risk impact**.
4. Select **New**.
5. Enter a label in the Enterprise Risk Impact Configuration page.
   The **Value** field is an incremental field and cannot be edited.
6. Select **Submit**.
   The **Display Name** field is automatically populated and is a concatenation of the value and the label. For example, if 1 is the value and Low is the label, the **Display Name** field appears as `1 - Low`.
7. To add more configuration values, repeat steps 2-4.
   There should be a minimum of three impact records and a maximum of ten.
8. Select **Freeze** after you have added the configuration records.
9. Select **OK** in the warning message box to continue freezing your configuration records.

> **Note:** You cannot add or delete any impact configuration records after you select **Freeze**. You can however edit the **Label** field in the existing records.

Create configuration values for risk scores

Use the Risk Score module to create configuration values for risk score bands.

Before you begin

Before creating configuration values for risk score, ensure that you have added and frozen configuration value for the two vectors: likelihood and impact in the Risk Likelihood and the Risk Impact modules, respectively.

Role required: sn_eam.enterprise_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

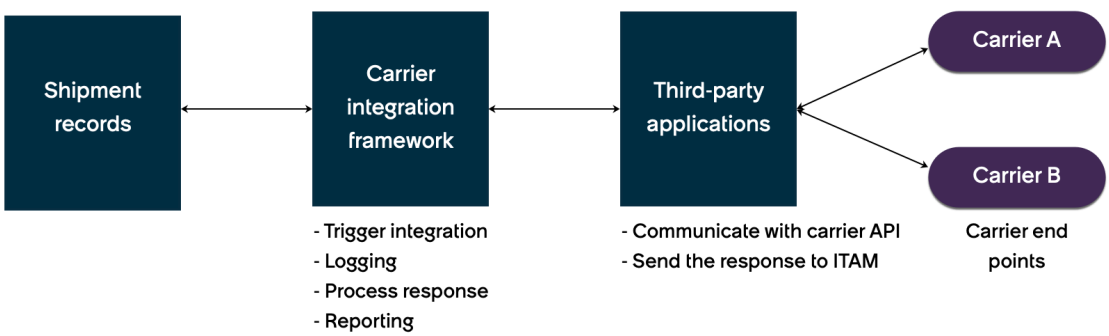
1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Risk configuration** > **Risk score**.
4. Select **New**.
5. Fill in the form details.

Field	Description
Start	Start value of the risk score band.
End	End value of the risk score band. The value is automatically populated using the maximum likelihood and impact configu ration values.
Label	Label of the risk score band.
Color	Color depicting a risk score band. Following are the values to choose from: ○ Green ○ Yellow ○ Orange ○ Red

6. Select **Submit**.
   Based on the other fields, the **Band name** field is automatically populated.
7. To add more risk score bands, repeat steps 2-4.
   There should be a minimum of two score band records and a maximum of four.
8. Select **Freeze** after you have added the entire risk range.
   To edit the records, select **Unfreeze**.

Managing enterprise asset shipments

Track and manage your enterprise asset shipments in real-time by integrating the Enterprise Asset Management application with third-party shipping carriers using the IT Asset Management integration framework.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Prerequisites

Before you can integrate the Enterprise Asset Management application with a third-party shipping carrier, the shipping carrier must complete the following prerequisites:

- Enable cross scope access on their third-party application.
- Create a script include that extends the base ITAMShipmentIntegration script so that you can connect to their third-party application and retrieve shipment details in real-time.
  - The script include must be available in the IT Asset Management application scope. However, the Caller access isn't restricted and Accessible from fields must be available in All application scopes.
  - Business logic must be implemented within the fetchShipmentinfo function to enable communication with the carrier API based on tracking numbers. The carrier API is required for connecting to the third-party application and for retrieving shipment details.
  - The fetchShipmentinfo function must return a JSON object with the following HTTP response code and message:

    ```
    {
    httpResponseCode: 200, httpResponseMessage: 'SUCCESS'
    }
    ```

  - When the script include is in test mode, the shipping carrier invokes the carrier API to validate your connection to their third-party application. The shipping carrier can then either verify and return the response or query the shipments and invoke the processResponse function using the following response format:

    ```
    [
    {
    trackingNumber: '',
    deliveryDate: '',
    pickupDate: '',
    packageStatus: ''.
    statusDetail: '',
    trackingURL: '',
    parcelWeight: '',
    deliveryServicesCost: '',
    currency: ''
    }
     ]
    ```

    If the shipping carrier invokes the processResponse function, they must return the response after the function completes.
- Create an integration profile with the appropriate name, carrier API details, and connection details. This integration profile enables you to connect to the third-party application so that you can retrieve shipment details.
- If the third-party application uses the ServiceNow Credentials [discovery_credentials] table or any other ServiceNow table with Password2 fields, provide a KMF access map policy to enable access to those tables. For more information on KMF access map policies, see Password2 encryption with the Key Management Framework (KMF).

After the shipping carrier completes these prerequisites, you must complete these additional prerequisites:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If the integration profile contains connection details through a connection and credentials alias, update those details as needed so that you can successfully authenticate and connect to the carrier API.
- Associate the shipping carrier with the integration profile.

Create a shipping carrier record in the Enterprise Asset Workspace

Create a shipping carrier record in the Enterprise Asset workspace to associate the carrier with an integration profile.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Shipping** > **Shipping carrier**.
4. Select **New**.
5. On the form fill in the fields.

Create New Shipping Carrier form

Field	Description
Name	Name of the shipping carrier.
Email	Email address of the shipping carrier.
Integration profile	Profile for integrating with the third-party carrier's application. For more details, see View integration profiles for third-party shipping carriers in the Enterprise Asset Workspace.
Status	Status of the carrier. This field is set to **Active** by default.
Phone	Phone number of the shipping carrier.
Website	Website of the shipping carrier.
Company	Company name of the shipping carrier.
Notes	Additional information about the carrier.

6. Select **Save**.
   The shipping carrier record is created and added to the Shipping carrier list.

Script include for third-party shipping carrier integrations

Before you can integrate the Enterprise Asset Management application with a third-party shipping carrier, that shipping carrier must create a script include that extends the base

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ITAMShipmentIntegration script. By extending this script, you can connect to the third-party shipping carrier application and retrieve shipment details in real-time.

Example: Structure of the ITAMShipmentIntegration script include

```
var ITAMShipmentIntegration = Class.create();
ITAMShipmentIntegration.prototype = {
    initialize: function() {
    },

    /**
     * Encapsulates communication with end point and fetching tracking info
     * If used in test mode, only response details would be returned
     * Else this API should invoke processResponse with the shipment details and return response code, message
     *
     * @param {array of string} trackingNumbers Shipment tracking numbers
     * @param {string} mode Can be 'test' or empty string
     */
    fetchShipmentInfo: function (trackingNumbers, mode) {
        // Communicate with API
        // Process the response
        // If mode === 'test' return response
        // Else Invoke post processing function and then return response
        /**
         * Expected response format to be passed to processResponse: array of objects
         * where each object corresponds to a single shipment
         *
         * Expected response format to be returned: JSON object with keys - httpResponseCode, httpResponseMessage
         * httpResponseCode - response code
         * httpResponseMessage - detailed message
         */
    },

    /**
     * Encapsulates to update shipment records with the response received
     *
     * @param {array of objects} response Response from API
     * Expected response format: array of JSON, where each JSON would have values with below keys
     * trackingNumber, deliveryDate, pickupDate, packageStatus, statusDetail, trackingURL
     */
    processResponse: function (response) {
        // Update shipment records
        if (!gs.nil(response)) {
            var mappingObj = sn_itam_common.ITAMIntegrationUtil.SHIPMENT_RESPONSE_COL_MAPPING;
            response.forEach(function(recordObj) {
                var shipmentRecord = new global.GlideQuery(sn_itam_common.ITAMIntegrationUtil.SHIPMENT_TABLE)
                    .where('tracking_number', recordObj.trackingNumber)
                    .where('stage', '!=', 'cancelled')
                    .toGlideRecord();
                shipmentRecord.query();
                while (shipmentRecord.next()) {
                    for (col in mappingObj) {
                        var value = recordObj[mappingObj[col]];
                        if (gs.nil(value)) {
                            shipmentRecord.setValue(col, null);
                        } else {
                            shipmentRecord.setValue(col, value);
                        }
                    }
                    shipmentRecord.update();
                }
            });
        }
    },

    type: 'ITAMShipmentIntegration'
```

fetchShipmentInfo function

The fetchShipmentInfo function within the ITAMShipmentIntegration script include retrieves tracking numbers from your ServiceNow instance and then invokes the carrier API to fetch shipment details for those tracking numbers. To enable communication with the carrier API based on tracking numbers, the shipping carrier must define the corresponding business logic within the fetchShipmentInfo function. This function processes responses from the carrier API and then initiates the processResponse function.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

processResponse function

The processResponse function within the ITAMShipmentIntegration script include retrieves responses from the carrier API and then updates your shipment records with the following shipping carrier details:

- Carrier link
- Carrier status
- Carrier status detail
- Carrier pick-up date
- Carrier delivered date
- Currency
- Delivery services cost
- Parcel weight

Important: The IT Asset Management application automatically defines the business logic within this function. The business logic should not be modified.

Integrate with a third-party shipping carrier in the Enterprise Asset Workspace

Integrate the Enterprise Asset Management application with a third-party shipping carrier so that you can track the real-time status of your enterprise asset shipments.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Shipping** > **Carrier integration**.
4. Select **New**.
5. On the form, fill in the fields.

Create New Shipping Carrier form

Field	Description
Name	Name of the shipping carrier.
Email	Email address of the shipping carrier.
Integration profile	Integration profile that you are using to connect to the third-party shipping carrier application. **Note:** Integration profiles are automatically created by each shipping carrier.
Status	Status of the shipping carrier.
Phone	Phone number of the shipping carrier.
Website	Third-party website of the shipping carrier.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Company	Company name of the shipping carrier, such as FedEx or UPS.
Notes	Additional notes about the shipping carrier.

6. Select **Save**.

View integration profiles for third-party shipping carriers in the Enterprise Asset Workspace

View the integration profiles for your third-party shipping carriers in the Asset operations view of the Enterprise Asset Workspace. These integration profiles enable you to connect to third-party shipping carrier applications so that you can retrieve shipment details for your enterprise assets.

Before you begin

Role required: sn_eam.enterprise_asset_technician, sn_eam.enterprise_asset_manager, or sn_eam.enterprise_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Shipping** > **Carrier integration**.
4. View the complete list of integration profiles.
   Select an integration profile to view additional details, including the connection details, associated shipping carriers, scheduled job for fetching shipment details, and logs of the scheduled job.

Associate a third-party shipping carrier with an integration profile in the Enterprise Asset Workspace

Associate a third-party shipping carrier with an integration profile so that you can successfully connect to that shipping carrier.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

Each shipping carrier can be associated with only one active integration profile at a time. If any of your integration profiles are not already associated with a shipping carrier, you can view and take action on those integration profiles by using the Unmapped carrier profiles important action in the Inventory view of the Enterprise Asset Workspace.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Shipping** > **Carrier integration**.
4. Select the integration profile that you want to associate a shipping carrier with.
5. On the integration profile record, select the **Shipping Carriers** tab.
6. Associate a shipping carrier with the integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- To associate an existing shipping carrier with the integration profile, use the following steps:

  a. Select **Add**.

  The Add carriers dialog box opens.

  b. In the dialog box, search for and select the shipping carrier that you want to associate with the integration profile.

  > **Note:** The dialog box displays only the shipping carriers that aren't already associated with an integration profile.

  c. Select **Add**.

- To associate a new shipping carrier with the integration profile, use the following steps:

  a. Select **New**.

  b. On the form, fill in the fields.

  Create New Shipping Carrier form

Field	Description
Name	Name of the shipping carrier.
Email	Email address of the shipping carrier.
Integration profile	Integration profile that you are using to connect to the shipping carrier. This field populates automatically.
Status	Status of the shipping carrier.
Phone	Phone number of the shipping carrier.
Website	Third-party website of the shipping carrier.
Company	Company name of the shipping carrier, such as FedEx or UPS.
Notes	Additional notes about the shipping carrier.

  c. Select **Save**.

Result
The shipping carrier is associated with the integration profile.

Remove a third-party shipping carrier from an integration profile in the Enterprise Asset Workspace

Remove a third-party shipping carrier that you no longer want to associate with an integration profile.

Before you begin
Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. From the navigation panel of the Admin center view, navigate to **Shipping** > **Carrier integration**.
4. Select the integration profile that you want to remove a shipping carrier from.
5. On the integration profile record, select the **Shipping Carriers** tab.
6. Select the check box for the shipping carrier that you want to remove.
7. Select **Remove**.

Result
The shipping carrier is no longer associated with the integration profile.

Test the integration profile for a third-party shipping carrier in the Enterprise Asset Workspace

Test the integration profile for a third-party shipping carrier so that you can mitigate any connection issues that arise.

Before you begin
Role required: sn_eam.enterprise_admin

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Shipping** > **Carrier integration**.
4. Select the integration profile that you want to test.
5. Select **Test connection**.
   A message appears, indicating whether the connection was successful or not.

   Note: If the integration profile fails to connect three or more consecutive times, you can view and take action on the corresponding connection issues by using the Carrier integration failures important action in the Inventory view of the Enterprise Asset Workspace.

Create a knowledge article for Enterprise Asset Management

Create and edit knowledge articles within a knowledge base to share information across your organization. You can create articles about the Enterprise Asset Management application on subjects such as troubleshooting and configuration.

Before you begin
Role required: sn_eam.enterprise_admin

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Asset knowledge base**.
4. Select **New**.
5. On the form, fill in the fields.
   For detailed information on the fields, refer to the Knowledge Management application

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Number	Number of the article. This field is automatically populated.
Knowledge base	The knowledge base selected for the article. Enterprise Asset Knowledge Base is selected by default. You can select a different knowledge base if you want to. **Note:** An article can only be associated with one knowledge base. You can change the knowledge base, but only if the selected article template is available in the knowledge base.
Category	The category for this article. Select a Knowledge base before you can select a category. Articles without a category appear on the knowledge homepage in the (empty) category.
Valid to	The date this knowledge article expires. Articles don't appear in search results after the Valid to date or if the Valid to date is empty. The default value of the this field is derived from the **Article Validity** field configured for the knowledge base. The Valid to date starts from the date that the article was created until the number of days specified in the **Article Validity** field. If the **Article Validity** field is empty, the default date in the **Valid to** field for the knowledge article is set to January 1, 2100. An article author or editor can select whether to keep or change the default Valid to date. On the first day of each month, the application sends an email notification to a list of authorized recipients to remind them about articles that are expire in the next month. The recipient can then extend the Valid to date to continue using the article. **Note:** If the system date format or user preferences is set to use `yy` year format, you might face issues when the Valid to date is set to the default date. Contact your administrator or modify the user preferences to use a date format with the `yyyy` year format.
Article type	The type of article, either HTML or wiki.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Workflow	The publication state of the article, such as Draft, In Review, or Published. When inserting a new article from an existing article, the state of the new article is reset to Draft.
Source task	The task this knowledge article was created in response to, if any. This field is set automat ically when you create the knowledge article from a task record.
Attachment link	Option for downloading an attached file auto matically when a user accesses the article, in stead of opening the article view. Add one or more attachments to the article to use this op tion. **Note:** You may attach multiple files, but most web browsers permit users to download only the first one. To ensure download of all the files, bundle them in to an archive, such as with WinZip, and attach the archive. The Attachment link option applies to articles accessed from search links only. Articles accessed as links within other knowledge articles won't replicate this behavior.
Display attachments	Option for displaying attachments to users viewing this knowledge article. Attachments appear below the article text. Add one or more attachments to the article to use this op tion.
Short Description	The title of the article. This title appears when browsing and searching for a knowledge arti cle, and at the top of the article. You can enter up to 100 characters in this field.
Article body	Content for the article. A preview of the con tent appears when browsing and searching for a knowledge article. Use the editing functions in the HTML editor to create content.

6. Select **Save** to create the article.

Result

After an article is created and published, users with the enterprise technician [enterprise_asset_technician] role can attach the articles to enterprise models.

You can search for or view articles in your ServiceNow instance by typing `Enterprise Asset Knowledge Base` in the navigation bar. All articles on Enterprise Asset Knowledge Base are listed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can also see the asset's model knowledge articles in the Model Knowledge related list in the asset form. The work order and the work order task forms also has the Parts Knowledge related list.

Configure Google Maps to integrate with linear assets

Configure the integration between Google Maps and geomaps, a ServiceNow component, that provides Google Maps functionality while working on linear assets.

Before you begin

Role required: sys_admin

About this task

sn-geo-map is the UI component used to support the map visualization in linear assets. For more details on geomaps, see the section titled Geo Maps for linear assets in Linear assets in Enterprise Asset Management.

Procedure

1. Obtain a Google Maps API key.
   A Google Maps API Key is an alphanumeric key. For information, refer to Google documentation.
2. In your ServiceNow instance, navigate to **System Properties** > **All Properties**.
3. Search for the system property `google.maps.key` and open it.
4. Enter the Google Maps API key in the **Value** field.
5. Select **Save**.
   Google Maps and geomaps are integrated, enabling you to work on linear assets.

Opt-in to the Enterprise Asset Management Content Service

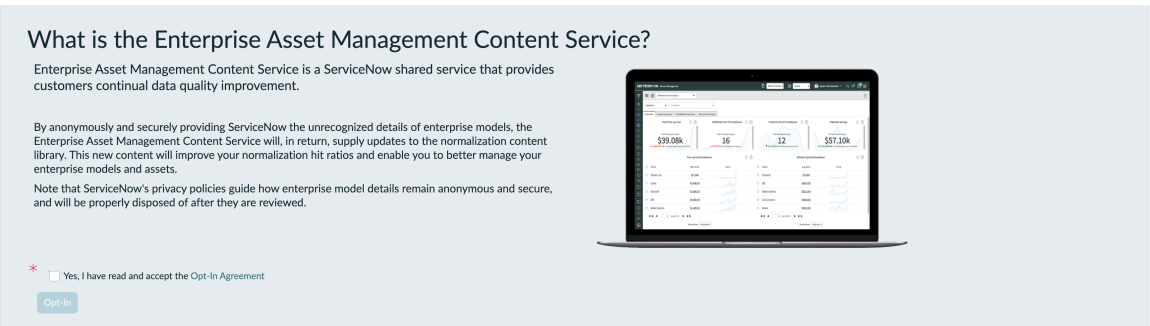
Opt in to the Enterprise Asset Management Content Service to share unnormalized enterprise model data from your organization with ServiceNow to improve the normalization process.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Normalization opt-in**.
4. Select **Opt-In Agreement** to read the agreement and then select the check box, **Yes, I have read and accept the Opt-in Agreement**.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select **Opt-In**.



   After you opt in, the Enterprise Models, Enterprise Model Lifecycles, Firmware Discovery Models, Firmware Model Lifecycles, Custom Firmware Models KPIs, and Custom Firmware CPE mapping are automatically enabled. The Custom Enterprise Product Models KPI is automatically disabled.

6. To disable a KPI, select the toggle button next to the KPI and then select **Save**.
7. To opt out, select **I would like to opt my company out of the Enterprise Asset Management Content Service Program** and then select **Opt-Out**.
   After you opt out, the Enterprise Models, Enterprise Model Lifecycles, Custom Enterprise Product Models, Firmware Discovery Models, Firmware Model Lifecycles, Custom Firmware Models KPIs, and Custom Firmware CPE mapping are disabled and your company no longer contributes to the improvement of the normalization process. You still receive incremental content updates, based on what the Content Service team can create from other sources. Your company can rejoin the Enterprise Asset Management Content Service at any time.

Create an enterprise catalog category

Create an enterprise catalog category to group related product catalog items within the Service Catalog.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

Catalog categories organize related product catalog items into logical groupings within your product catalogs. These groupings can help users locate and request available product offerings more intuitively and efficiently. You can organize catalog categories hierarchically, using both parent and child catalog categories to reflect the hierarchical relationships between your products.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Product catalog** > **Product catalog categories**.
4. Select **New**.
5. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Category form

Field	Description
Title	Name of the catalog category.
Catalog	Product catalog that the catalog category is associated with. Set this field to **Service Catalog**. **Note:** The Service Catalog is the default product catalog for all enterprise models.
Location	Geographic location that the catalog category is supported in.
Active	Option indicating that the catalog category is active.
Parent	Parent catalog category that this catalog category is a child of.
Roles	User roles that can access and request the product catalog items that are grouped under this catalog category.
Description	Detailed description of the catalog category.
Desktop image	Catalog category image that appears on desktop versions of the product catalog home page. Use any of the following image formats: ○ PNG ○ JPG ○ GIF ○ WebP
Icon	Icon that appears next to the catalog category name in the product catalog. Use an image size of either 64 x 64 pixels or 128 x 128 pixels. **Note:** This Icon is applicable only for child catalog categories.
Header icon	Icon that appears next to the catalog category header in the product catalog. Use an image size of either 64 x 64 pixels or 128 x 128 pixels. **Note:** This icon is applicable only for top-level catalog categories.

6. Select **Save**.

Result

The catalog category is added to the Service Catalog.

Each time you subsequently publish a related enterprise model to the Service Catalog, you must specify that it's associated with the given catalog category in the **Category** field of the Publish model to Enterprise Asset Catalog dialog box. The Enterprise Asset Management application automatically generates a corresponding product catalog item and then adds it to the given catalog category. You can view the list of all associated product catalog items in the **Catalog items** tab of the catalog category record. Users can locate and request the product catalog item under the given catalog category in the Service Catalog.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Edit Field Service Management configurations for the Work management view

Edit your Field Service Management configurations as needed so that you can access and use the Work management view in the Enterprise Asset Workspace.

Before you begin

Role required: wm_admin

About this task

For more information about Field Service Management configurations, see Global domain configurations.

Procedure

1. Navigate to **All** > **Field Service** > **Administration** > **Configuration**.
2. Edit the following configurations on the **Business Process** tab:

Business Process tab

Configuration	Setting
Lifecycle	
Process life cycle	Set this configuration to **task-driven (subtasks are required)**.
Qualification is required for new requests	Turn off this configuration.
Agent must accept or reject the assigned task	Turn off this configuration.
Track agent travel time	Turn off this configuration.
Work notes are required to close or cancel a request or task	Enable this configuration.
Copy task work notes to request	Turn off this configuration.
Apply Work Order template in draft status	Enable this configuration.
Catalog and Request Creation	
Create or update requests by inbound email	Turn off this configuration.
Requests are created using	Set this configuration to **regular form only**.
Templates create a dedicated catalog item	Turn off this configuration.

3. Edit the following configurations on the **Assignment** tab:

Assignment tab

Configuration	Setting
Assignment method for tasks	Set this configuration to **manually**.
Use dispatch queue	Turn off this configuration.
Assign requests or tasks based on assignment group coverage areas	Turn off this configuration.
Assign tasks based on assignment group product models	Turn off this configuration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configuration	Setting
Assign tasks based on assignment group skills	Turn off this configuration.
Scheduling	
Use agent or task scheduling	Turn off this configuration.
Auto-selection of agents will consider time zone for tasks	Turn off this configuration.
Enable priority assignment	Turn off this configuration.
Additional Factors	
Auto-selection of agents will consider location of agents	Turn off this configuration.
Auto-selection of agents for tasks requires them to have skills	Set this configuration to **None**.

4. Edit the following configurations on the **Add-ons** tab:

Add-ons tab

Configuration	Setting
Part Requirements	
Part requirements are needed by agents	Enable this configuration.
Reserve parts in agent stockroom	Turn off this configuration.
Cancel open Transfer Orders	Turn off this configuration.
Edit associated models	Leave this configuration empty.
Documentation	
Enable a dedicated knowledge base	Turn off this configuration.
Enable managed documents	Turn off this configuration.
Enable task activities	Turn off this configuration.
Associated Task Tables	
Select associated tables	Leave this configuration empty.
Maps	
Enable maps	Turn off this configuration.

5. Select **Save**.

Related topics

Managing work orders for your enterprise assets

Managing enterprise models and assets

Create and manage your enterprise models and assets throughout their life cycle.

Overview of managing assets and models

Create and manage your enterprise models and assets by performing the following tasks.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Task	Role required	Resources
Create multi-component models and assets	• sn_eam.enterprise_admin • sn_eam.enterprise_asset_manager	• Create a multi-component model • Create a multi-component asset
Create enterprise models and assets	• sn_eam.enterprise_admin • sn_eam.enterprise_asset_manager	• Create enterprise models • Create enterprise assets
Create enterprise model components	• sn_eam.enterprise_admin • sn_eam.enterprise_asset_manager	Create enterprise model components
Create and import classification codes	• sn_eam.enterprise_admin (for creating classification codes) • sn_eam.enterprise_asset_manager (for importing classification codes)	• Create a classification code • Import classification codes
Add or clone calibration attributes to an enterprise model and asset	• sn_eam.enterprise_admin • sn_eam.enterprise_asset_manager	• Add calibration attributes to an enterprise model • Clone calibration attributes to an enterprise model • Add calibration attributes to an enterprise asset • Clone a calibration attribute to an enterprise asset
Create linear assets and linear asset types	sn_eam.enterprise_asset_manager	• Create linear assets • Create linear asset types
Create pallet assets	• sn_eam.enterprise_asset_manager • sn_eam.enterprise_asset_technician	Create pallet assets in the Enterprise Asset Workspace
Configure TCO for assets	sn_eam.enterprise_asset_manager	Total Cost of Ownership (TCO) for enterprise assets

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Task	Role required	Resources
Create asset onboarding process and multi-asset onboarding process.	sn_eam.enterprise_asset_manager	• Create an asset onboarding process • Create a multi-asset onboarding process
Track assets using Indoor maps	• sn_eam.enterprise_admin • sn_eam.enterprise_asset_manager	Track assets using indoor maps in the Enterprise Asset Workspace
Manage enterprise asset shipments	sn_eam.enterprise_admin	Managing enterprise asset shipments
Manage enterprise asset move orders	sn_eam.enterprise_asset_manager	Managing enterprise asset move orders
Manage risk scores	sn_eam.enterprise_admin	Managing risk in Enterprise Asset Management
Normalize enterprise models	sn_eam.enterprise_admin	Normalizing enterprise models
Manage incidents	itil	Managing incidents in Enterprise Asset Management
Create knowledge articles	sn_eam.enterprise_admin	Create a knowledge article for Enterprise Asset Management

Create and manage enterprise models

Create and manage your enterprise models to keep track of your enterprise assets.

Create a multi-component model

Create a multi-component model to define more than one model component based on the same product model.

Before you begin

For details on multi-component models, see Multi-component models and assets in Enterprise Asset Management.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. Create a model by navigating to **Enterprise Asset Workspace** > **Enterprise model management**
   You can create a pre-assembled or an user-assembled model. For details on creating a model, see Create enterprise models.
2. After you created a model, add model components to the model.
   For details on creating model components, see Create enterprise model components.
3. Once you added the model components to the model, change the status of the model to **In Production**.
4. Select **Publish to Enterprise Asset Catalog** to publish your model to the catalog.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create enterprise models

Create a model based on a top tier Enterprise Asset Management model category. Use models to manage and keep track of your assets.

Before you begin

You can create a model based on any of the following Enterprise Asset Management model categories:

- Construction
- Medical
- Transportation
- Industrial
- Facility
- Retail
- Tactical equipment
- Wearable
- Multimedia production equipment
- Pallet

Note: Only consumables created from models in the Enterprise Asset Management application can be used if the **Asset strategy tracking** for the model is set to **create consumable asset**.

Note: The Enterprise Asset Management application supports only facilities models that fall under the Facility model [sn_ent_facility_model] child class of the Enterprise good model [sn_ent_model] class. The application does not support facilities models that are listed in the Facility Models [cmdb_facility_product_model] table.

Role required: sn_eam.enterprise_admin or sn_eam.enterptrise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise model management**
2. Select the tab for the model type that you want to create.
   - Select the **All enterprise** tab for all available enterprise model types.
   - Select the tab for a specific enterprise model type, such as **Facility**, **Industrial**, **Medical**, **Retail**, or **Transportation**.
   - Select the **All models** tab for pallet models.
3. Select **New**.
   If you are creating a pallet model, select **New pallet model**.

   If you select **New** on any tab other than the **All models** tab, a dialog box opens, prompting you to specify the type and category of the new model that you are creating. Proceed to step 4 to fill in the fields in the dialog box.

   If you select **New pallet model** on the **All models** tab, you are automatically redirected to the Create New Product Model page. Proceed to step 6 to fill in the fields on the page.
4. In the dialog box, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Type **Note:** This field appears only if you selected **New** on the **All enterprise** tab.	The type of model you want to create. Choose from the following options: ○ Enterprise Good Model ○ Construction Model ○ Facilities Model ○ Industrial Model ○ Medical Model ○ Retail Model ○ Transportation Model ○ Tactical Equipment Model ○ Wearable Model
Model category	The category that the model belongs to.

5. Select **Create**.
   The Create New Product Model page appears. The model is in **Build** status by default and the model category is a read-only field set to the category that you chose. You can change the status only after you have saved the model record.
6. On the form, fill in the details.
   For a detailed description of the fields, see Model fields for Enterprise Asset Management.
7. Select **Save**.
   The model is created along with the related tabs such as **Model Components**, **Assets**, **Enterprise Model Lifecycles**, **Compatibles**,**Substitutes**, and **Vendor Catalog Items**. You can perform additional configuration on the model by entering details in the related tabs.
8. Change the status of the model to **In Production** once you are done configuring the model.
9. Select **Publish to Enterprise Asset Catalog** to publish your model to the Service Catalog.**Publish to Enterprise Asset Catalog** appears only when you change the status of the model to **In Production**.
   Enterprise models can be deleted only by the sn_eam.enterprise_admin role.
10. You may select **Update risk** if you updated the model's risk scores and want to propagate the updated scores to the associated assets too.
    After the *EAM - Update model risk values to asset* scheduled job is completed, the risk values for all the assets associated with this model is updated.

Create enterprise model components

Create model components and add them to a model. A model comprising of one or more model components is a multi-component model.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

The model category for the component can differ from that of the model. You can choose a different model category for the model component. You can add model components to a model only when the model is in **Build** status.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise model management**.
2. Select the **All enterprise** tab or the specific model tab for which you want to create model components.
3. Select a model to open the model record.
   The Create New Model Component page opens.
4. Select the **Model Components** tab and select **New**.
5. On the form, fill in the details.
   For detailed description of the fields, see Model fields for Enterprise Asset Management.
6. Select **Save**.
   The newly created model component appears in the **Model Components** tab. The model component has a status of In production even though the model has a status of Build.

Add a substitute model for an enterprise model

On an enterprise model record, specify the related models that you can substitute the enterprise model with.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterptrise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise model management view.
2. Select either the **All enterprise** tab or the tab for a specific model category, such as **Construction**.
3. From the list of available enterprise models, select the enterprise model that you want to add substitute models for.
4. On the **Substitutes** tab of the enterprise model record, add substitute models for the given enterprise model.

   a. On the **Substitutes** tab, select **Add**.

   b. In the Add model substitute dialog box, select the check box for each model that you want to add as a substitute model.

   Note: The dialog box displays only the enterprise models that have the same **Asset tracking strategy** as the given enterprise model and do not have a **State** of **Build**.

   c. Select **Add**.
   The dialog box closes and you return to the **Substitutes** tab.

   d. On the **Substitutes** tab, select the Refresh list icon to populate the list of newly added substitute models.

Add calibration attributes to an enterprise model

Add calibration attributes to an enterprise model to specify and manage the calibrations that are required for the associated enterprise assets throughout their life cycles.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

You can add calibration attributes at the enterprise model level or at the individual enterprise asset level. Alternatively, you can create common calibration attributes that are not associated with any enterprise models or enterprise assets. For details on how to add calibration attributes to an individual enterprise asset, see Add calibration attributes to an enterprise asset. For details on how to create common calibration attributes, see Create a calibration attribute library.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Enterprise model management view.
3. Select either the **All enterprise** tab or the tab for a specific model category, such as **Construction**.
4. From the list of available enterprise models, select the enterprise model that you want to add calibration attributes to.
5. On the **Calibration attributes** tab of the enterprise model record, select **New**.
6. On the form, fill in the fields.

Create New Calibration Attribute form

Field	Description
Attribute details	
Name	Name of the calibration attribute.
Short description	Brief description of the calibration attribute.
Criticality	Criticality level that indicates how important the calibration attribute is.
Service frequency	Frequency at which you must perform the calibration.
Category	Type of calibration. **Note:** The Enterprise Asset Management application includes default calibration categories such as Electrical, Flow, Humidity, and Pressure. You can create additional calibration categories for any calibrations that do not fall under the default categories. For detailed instructions, see Create a calibration category for your enterprise asset calibrations.
Active	Option that indicates if the calibration attribute is active.
Order	Order in which the calibration attribute applies to the enterprise model. If your enterprise model contains more than one calibration attribute, the attribute with the lowest numerical value applies to the model first. **Important:** You must use a unique numerical value for each calibration attribute.
Calibration properties	
Value type	Method by which you want to measure tolerance conformance. Select one of the following options:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ **Accuracy % full scale**: Fixed percentage of accuracy that your calibration measurements must fall within at any point within the enterprise asset's full measurement range. The corresponding tolerance limits remain the same at every point within the measurement range. For example, if a measurement range is 100 units and the accuracy percentage is set to ±1%, the tolerance limits are ±1 unit at every point within the measurement range. ○ **Accuracy % point**: Fixed percentage of accuracy that your calibration measurements must fall within at a specific point within the enterprise asset's full measurement range. The corresponding tolerance limits increase or decrease proportionally based on the value of the point that you are comparing your calibration measurement against. For example, if your accuracy percentage is set to ±1% and you want to compare your calibration measurement against a point that has a value of 50 units, the tolerance limits for this specific point are ±0.5 units. If you want to compare your calibration measurement against a point that has a value of 60 units, the tolerance limits increase to ±0.6 units. ○ **Range**: Measurement range that your calibration measurements must fall within. The corresponding tolerance limits are based on the lowest and highest acceptable point values within the range. ○ **Less than**: Value within the enterprise asset's full measurement range that your calibration measurements must fall below. The corresponding tolerance limit is based on the highest acceptable point value within the range. ○ **Greater than**: Value within the enterprise asset's full measurement range that your calibration measurements must lie above. The corresponding tolerance limit is based on the lowest acceptable point value within the range. ○ **True/false**: Option to assess any qualitative elements of the calibration.
Scale	Full measurement range that you're measuring tolerance conformance against. **Note:** This field appears only if you set the **Value type** field to **Accuracy % full scale**.
Unit	Unit of measurement that you're using to measure tolerance conformance. **Note:** This field appears only if you set the **Value type** field to one of the following options: ○ **Accuracy % full scale** ○ **Accuracy % point** ○ **Range** ○ **Less than** ○ **Greater than**
Accuracy (%)	Percentage of accuracy that your calibration measurements must fall within. **Note:** This field appears only if you set the **Value type** field to either **Accuracy % full scale** or **Accuracy % point**.
Resolution	Smallest distinguishable change in value that you can detect and measure. The higher the resolution is, the more specific the change in value is.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This field appears only if you set the **Value type** field to one of the following options: ○ **Accuracy % full scale** ○ **Accuracy % point**
Quality standard	
Quality standard	Set of requirements and guidelines that you must follow when performing the calibrations. **Note:** You can create quality standards manually in the Admin center view of the Enterprise Asset Workspace. See Create a quality standard for your enterprise asset calibrations for detailed instructions.
Instrument	
Instrument model	Model of the instrument that you must use to perform the calibrations.
Instruction	General instructions or instrument settings that you must follow when performing the calibrations.

7. Select **Save**.
   The form closes and you are automatically redirected to the new calibration attribute record.
8. Specify the points at which you can measure tolerance conformance.

Important: You must specify one or more points within each enterprise asset's measurement range. If you do not specify at least one point, the calibration attribute cannot be set to Active.

a. On the calibration attribute record, select **Add calibration points**.
   The Calibration points dialog box opens.

b. In the dialog box, fill in the fields.

Calibration points dialog box

Field	Description
Point name	Name of the point.
Expected value	Value that you want to measure tolerance conformance against. If you set the **Value type** field to either **Accuracy % full scale** or **Accuracy % point** in the Create New Calibration Attribute form, enter the value of the point that you want to measure against. If you set the **Value type** field to **True/false**, select a Boolean value of either **true** or **false**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This field appears only if you set the **Value type** field to one of the following options in the Create New Calibration Attribute form. ▪ **Accuracy % full scale** ▪ **Accuracy % point** ▪ **True/false**
Order	Order in which you want to use the point to measure tolerance conformance. If your calibration attribute contains more than one point, the point with the lowest numerical value is calibrated first. **Important:** You must use a unique numerical value for each point.
Lower tolerance	Lowest acceptable value that the calibration measurement can reach to stay in conformance. **Note:** This field appears only if you set the **Value type** field to one of the following options in the Create New Calibration Attribute form: ▪ **Accuracy % full scale** ▪ **Accuracy % point** ▪ **Range** ▪ **Greater than** If you set the **Value type** field to either **Accuracy % full scale** or **Accuracy % point**, this field is read-only.
Upper tolerance	Highest acceptable value that the calibration measurement can reach to stay in conformance. **Note:** This field appears only if you set the **Value type** field to one of the following options in the Create New Calibration Attribute form: ▪ **Accuracy % full scale** ▪ **Accuracy % point** ▪ **Range** ▪ **Less than** If you set the **Value type** field to either **Accuracy % full scale** or **Accuracy % point**, this field is read-only.

c. To add an additional point to the calibration attribute, select the Add Content icon and then fill in the fields.
Repeat this step for each point that you want to add.

d. Select **OK**.

The dialog box closes and the points appear on the **Calibration points** tab of the calibration attribute record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

Create work orders to track the calibrations that are made to the associated enterprise assets. These work orders must use a work order template with tasks that have a Work type of Calibration. For more information on work orders, see Managing work orders for your enterprise assets.

Clone calibration attributes to an enterprise model

Clone an existing calibration attribute to an enterprise model to add a calibration attribute with similar settings.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise model management view.
2. Select either the **All enterprise** tab or the tab for a specific model category, such as **Construction**.
3. From the list of available enterprise models, select the enterprise model that you want to clone a calibration attribute to or from.
4. On the **Calibration attributes** tab of the enterprise model record, use one of the following options to clone a calibration attribute:
   - To clone a calibration attribute from this enterprise model to another enterprise model, use the following steps:
     a. From the list of available calibration attributes, select the check box for the calibration attribute that you want to clone.
     b. Select **Clone to models**.
     c. In the Select models dialog box, select the **Clone as active** check box to automatically set the cloned calibration attribute to active.
     d. Select the check box for the enterprise model that you want to clone the calibration attribute to.
     e. Select **Clone**.

     The calibration attribute is cloned to the selected enterprise model.

     Note: If the selected enterprise model already contains another calibration attribute with the same name, this attribute is cloned with a numeric suffix appended to the name.
   - To clone a calibration attribute from another enterprise model to this enterprise model, or to clone a common calibration attribute from your calibration attribute library to this enterprise model, use the following steps:
     a. Select **Clone from**.
     b. In the Select attribute to clone dialog box, select the **Clone as active** check box to automatically set the cloned calibration attribute to active.
     c. Select the check box for the calibration attribute that you want to clone.
     d. Select **Clone**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The calibration attribute is cloned to the enterprise model and appears in the list of available calibration attributes.

Note: If the enterprise model already contains another calibration attribute with the same name, this attribute is cloned with a numeric suffix appended to the name.

Enterprise Asset Management normalization

The Enterprise Asset Management normalization process enables you to normalize your manufacturer, model name, model number, and model type data of your enterprise models.

Normalization overview

The normalization process compares the discovered manufacturer, discovered model, discovered model type, and the discovered model number values against the ServiceNow repository of normalized equivalents in the Enterprise Asset Management Content Service.

To standardize your enterprise models, the data must be normalized. You can manually update the model records with the normalization content, or you can compare your data against the Enterprise Asset Management Content Service.

Scheduled jobs for Normalization

The following are the scheduled jobs that run during the normalization process.

Scheduled job	Description
EAM - Daily Job	Sets the time when data is pulled by the Enterprise Asset Management Content Service. This job runs only once, when the normalization process is started for the first time. If a model has gone beyond its end of its lifecycle date, this job enables the **Content lifecycle phase** check box in the **Enterprise Model Lifecycle** tab in a model record.
EAM - Content Upload	A daily job that uploads any content to the Enterprise Asset Management Content Service that you have added in the following custom tables: • Custom Enterprise Model Type [sn_eam_cd_custom_model_type] • Custom Enterprise Manufacturer [sn_eam_cd_custom_manufacturer • Custom Enterprise Product Model [sn_eam_cd_custom_product_model] • Custom Enterprise Model Library [sn_eam_cd_custom_model_library]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scheduled job	Description
	Note: This job only runs if you have opted in to the Enterprise Asset Management Content Service.
EAM - Enterprise Lifecycles	Updates the model record with information about newly created or deleted life cycles.
EAM - Normalization	Normalizes all the models that haven't been normalized.
EAM - Apply latest content changes	Updates any changes in the content tables to the Enterprise Asset Management Content Service.

Tables installed with Enterprise Asset Management normalization

Several normalization tables are installed with the activation of the Enterprise Asset Management application.

Tables installed

Table	Description
Custom Enterprise Model Type [sn_eam_cd_custom_model_type]	Stores custom enterprise model type records.
Custom Enterprise Manufacturer [sn_eam_cd_custom_manufacturer]	Stores custom enterprise manufacturer records.
Custom Enterprise Product Model [sn_eam_cd_custom_product_model]	Stores custom enterprise product model records.
Custom Enterprise Model Library [sn_eam_cd_custom_model_library]	Stores enterprise model library records.
Enterprise Model Type [sn_eam_cd_model_type]	Stores enterprise model type records.
Enterprise Manufacturer [sn_eam_cd_manufacturer]	Stores enterprise model manufacturer records.
Enterprise Product Model [sn_eam_cd_product_model]	Stores enterprise product model records.
Enterprise Model Library [sn_eam_cd_model_library]	Stores enterprise model library records.
Enterprise Lifecycle Definition [sn_eam_cd_lifecycle_definition]	Stores lifecycle phase of an enterprise model and associated dates.
EAM Content Audit [sn_eam_content_audit]	Stores the content values that changed.
Manage Enterprise Library [sn_eam_manage_cd_library]	Stores import and export content data.
Enterprise Asset Configurations [sn_eam_configuration]	Stores opt-in and opt-out data.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View the enterprise model hierarchy in the Enterprise Asset Workspace

View the hierarchy details of pre-assembled and user-assembled enterprise models in a tree-like format in the Enterprise Asset Workspace.

Before you begin
Role required: sn_eam.enterprise_asset_manager

About this task
The Model hierarchy option is shown only for a model that's associated with a parent or that has model components. Model hierarchy isn't shown for simple, consumable, and hardware models. The parent hierarchy details of a model aren't displayed.

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Model management**.
2. Select the pre-assembled or user-assembled model.
3. Select the Hierarchy icon ( ) on the contextual sidebar.
   The model hierarchy is shown in a tree-like format. All the model components of the model that you selected are displayed.

   On the model hierarchy, the following details are displayed:
   - A number at the right of the model shows the total number of model components associated with that model.
   - Quantity is displayed only for consumable models.
   - The component number is added as a prefix to the model component.

Manage the lifecycle of enterprise models with calculated lifecycle templates

Manage the complete lifecycle of enterprise models by creating calculated lifecycle templates and associating these templates with the models.

Create Calculated model lifecycle templates in the Enterprise Asset Workspace

Create Calculated model lifecycle templates to manage the complete lifecycle of the models efficiently.

Before you begin
Role required: sn_eam.enterprise_asset_manager

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Asset Operations**.
2. From the **Calculated model lifecycle** list, select **Calculated model lifecycle templates**.
   The list of existing Calculated model lifecycle templates is displayed.
3. Select **New**.
4. On the form, fill in the fields.

Create New Calculated Lifecycle Template form

Field	Description
Name	Name of the Calculated lifecycle template.
Description	Brief information about the template.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Active	Option to indicate that the Calculated lifecycle template is available for use.

5. Select **Save**.
   The **Calculated Lifecycle formulas** tab is displayed with the list of calculated lifecycle formulas for the following lifecycle phases:
   - **End of Extended Support**
   - **End of Life**
   - **End of Sale**
   - **End of Support**
   - **End of General Availability**
6. Define the calculated lifecycle formula for a lifecycle phase.
   a. Select the calculated lifecycle formula.
   b. In the **Phase start** and **Phase end** fields, enter the number of months for calculating the start date and end date of the lifecycle phase.
   c. Select **Save**.
   The calculated lifecycle formula is updated with the values that you entered in the **Phase start** and **Phase end** fields.

What to do next
Associate the Calculated model lifecycle template with an enterprise model. For details, see Associate an enterprise model with a Calculated model lifecycle template.

Associate an enterprise model with a Calculated model lifecycle template

Associate an enterprise model with a Calculated model lifecycle template to populate the lifecycle details of the model automatically.

Before you begin
Role required: sn_eam.enterprise_asset_manager

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Enterprise model management**.
2. Select the **All enterprise** tab.
3. Select the model that you want to associate with a Calculated model lifecycle template.
4. In the **Model Details** section of the Model form, enter the template details.
   a. In the **Calculated lifecycle template** field, select the calculated model lifecycle template that you want to apply to the model.
   b. In the **Calculated lifecycle start date**, select the date from which the Phase start date and Phase end date are calculated for each lifecycle phase defined in the Calculated lifecycle template that you selected.
5. Select **Save**.

Result
The list of lifecycle phases with details such as Phase start date, Phase end date, and Source is displayed in the **Enterprise Model Lifecycles** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create and manage enterprise assets

Create and manage enterprise assets throughout their life cycle.

Create a multi-component asset

Track and manage your assets by creating a multi-component asset from a multi-component model.

Before you begin

For details on multi-component models, see Multi-component models and assets in Enterprise Asset Management.

Role required:

- sn_eam.enterprise_admin
- sn_eam.enterprise_asset_manager

Procedure

1. Create a model by navigating to **Enterprise Asset Workspace** > **Enterprise model management**
   For details on creating a model, see Create enterprise models.
2. After you created a model, add model components to the model.
   For details on creating model components, see Create enterprise model components.
3. Create assets from the multi-component model.

   You can create a pre-assembled or an user-assembled asset.

   For details on creating an asset, see Create enterprise assets. Once you create assets, child assets are automatically created.

   a. If you create a user-assembled asset, open the asset record.

   b. Select either of the two to assemble assets:

      - **Assemble**: gives you a choice to choose the assets present in the parent asset's stockroom. Once you select the assets, select **Assemble**. For details on assembling assets, see
      - **Auto assemble**: triggers a process that automatically selects assets from a stockroom and associates those assets with the parent asset. If the required quantity of assets is not available, an error appears.

   c. If you want to release all child assets, select **Release all assets**.

      This process releases all child assets from the parent asset and assigns them back to the parent stockroom.

      The released assets move to **In Stock** status. **Release all assets** is only visible on screen when assets are associated with a parent asset.

4. To swap child assets, in the Details tab select **SWAP**.
   The multi-component asset needs to be in the **In maintenance** state to swap assets. You can swap multiple child assets at one go with other assets from the same model in any stockroom. The model must be in the **In stock** state and **Available** sub state.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create enterprise assets

Create assets for specific model categories in the Enterprise Asset Management application.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

Enterprise asset classes have a one to one mapping to product model classes and model categories. Enterprise asset classes are mapped to existing CI classes where applicable.

There are two kinds of assets: consumable assets and serialized assets. Consumable assets don't have an asset tag or a serial number.

Note: This topic provides details on how to create enterprise, construction, facility, industrial, medical, retail, tactical equipment, transportation, and wearable assets. For details on how to create pallet assets, see Create pallet assets in the Enterprise Asset Workspace.

Unique identifiers for assets

When you create an asset, you can associate it with a model category that's linked to a CI class with identification rules defined for identifier fields like **Asset tag**, **Serial number**, and **MAC address**. These identification rules help uniquely identify each asset through the required identifier fields so that you can maintain accurate asset records. You can define identification rules for a CI class in the CMDB Identification and Reconciliation engine (IRE). For more information about identification rules, see Identification rules and Create a CI identification rule.

During asset creation, you must specify the value for at least one required identifier field. If any of the following scenarios occur, you must specify the value for the **Serial number** field:

- The asset is associated with a model category that is not linked to any CI class.
- The asset is associated with a model category that is linked to a CI class without any identification rules.
- The IRE is turned off.

Specifying the values for the required identifier fields is optional if you're creating an asset in the Build or On order state.

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Enterprise asset estate**.
2. Select the **All enterprise** tab to select from all the Enterprise Asset Management models or select a specific asset tab such as **Facility**, **Industrial**, **Medical**, **Retail**, **Transportation**, and **Consumable**.
3. Select **New**.
4. In the dialog box, fill in the fields.

Field	Description
Type	The type of asset you want to create. Choose from the following options:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Enterprise Asset ○ Construction Asset ○ Facilities Asset **Note:** The Enterprise Asset Management application supports only facilities assets that fall under the Facility asset [sn_ent_facility_asset] child class of the Enterprise asset [sn_ent_asset] class. The application does not support facilities assets that are listed in the Facility [alm_facility] table. ○ Industrial Asset ○ Medical Asset ○ Retail Asset ○ Transportation Asset ○ Tactical Equipment Asset ○ Wearable Asset **Note:** This field only appears if you selected **New** from the **All enterprise** tab.
Model category	The model category that the asset belongs to. Based on the model category selected, the asset can be linked to a configuration item.

5. Select **Create**.
   The Create new asset page appears. By default, the asset is in **Build** state. You can change the status only after you've saved the asset record.
6. In the Create New asset page, fill in the details.
   For a detailed description of the fields, see Asset fields for enterprise assets.
7. Select **Save**.
   The asset is created along with a Configuration Item (CI) for this asset. Child assets are automatically created for the newly created asset. You can perform additional configuration on the asset by entering details in the other tabs such as **Child Assets**, **Contracts**, **Expense Lines**, and **All Related Tasks**.

   Note: The All Related Tasks tab shows a list of the related tasks such as Disposal task, Resale task, Recall task, Work order task, and Move task associated with the asset. The Recall task and the Work order task associated with the child assets are also shown in the All Related Tasks tab.

   For the pre-assembled industrial assets, the MAC address field is also shown in the **Child Assets** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. After you're done performing the additional configuration on the asset, you can change the status of the asset to **In Use**.
   The asset can be deleted only by the sn_eam.enterprise_admin role.

Create linear assets

Create linear assets to diversify your Enterprise Asset Management portfolio.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Enterprise asset estate** > **Linear assets**.
2. Select **New**.
3. On the form, fill in the fields.

Field	Description
Name	Unique name of the linear asset.
Linear asset type	Type of the linear asset. Select from the list or you can create your own asset type.
Description	Description of the linear asset.
Location	Vicinity of your linear asset. To draw a lin ear asset, select the Geomap icon to dis play the map. After you enter the location, the map will properly focus and zoom to that vicinity. For more information on using the Geomap icon to connect geo coordinate points on a map, watch this short video
Boundary width	Boundary width of the linear asset. The boundary width helps in associating discrete assets with linear assets. The dis crete asset's location must fall within the linear asset's boundary widths. For exam ple, if the boundary width of a linear asset is 500 feet, a discrete asset can be associ ated to it only if the discrete asset is within 250 feet of that linear asset.
Width unit	The width of the linear asset in units.
Length unit	The unit the length of the linear asset is measured in.
Length	The length of the linear asset. This input field is optional. If it isn't filled out, it's calcu lated using the coordinates.
Start marker	The start point of the linear asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
End marker	The end point of the linear asset.
Coordinates	A list of two or more geographical (geo) points. Each geo point has a latitude and longitude. For example, [[37.377323, -121.961947], [37.380582, -121.976565]]. If you already have the linear asset's coor dinates, you can paste them into this field. Otherwise, you can use the Geomap icon in the **Attachments**section to draw the geo points on a map. The start marker and the end marker are created based on the first and the last co ordinates. Markers are common location records associated with the Geolocation type. In the common location hierarchy, all markers of a linear asset are placed under Vicinity Geolocation, which is under Vicin ity. Vicinity refers to the location of the lin ear asset.

4. Select **Save**.
   The linear asset is created and appears in the Linear assets list. You can perform additional configuration on the linear asset by entering details in the other related lists such as **Linear segments**, **Discreet assets**, **Related linear assets**, **Contracts**, and **Expense lines**.

Create segments for linear assets

Create segments for linear assets to assign work orders to the segments. You can also create maintenance plans for the segments.

Before you begin

Linear segments are parts of a linear asset. When creating a linear segment, you must enter values for any two of the following fields and the value for the third field is populated automatically. For example, when you enter the start and end markers, the **Length** field is automatically filled in. Similarly, entering the start marker and length populates the **End marker** field.

- Start marker
- End marker
- Length

If you enter start marker or end marker on the map, markers must be within 10 feet from the linear asset line. This value can be customized by changing the value of the asset_property *`com.eam.linear_segment_marker_boundary`*.

For details on creating work orders and maintenance plans, see Create a work order for an enterprise asset and Create a maintenance plan for your enterprise assets.

Role required: sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise asset estate** > **Linear assets**.
2. Open the linear asset record on which you want to add segments.
3. Select the Linear segments related list.
4. Select **New**.
5. On the form, fill in the details.

Field	Description
Name	Name of the linear segment.
Linear asset type	The linear asset type of the linear asset
Linear asset	The linear asset that the segment belongs to.
State	The current state of the linear asset.
Description	A brief description of the linear segment.
Location	Location of the linear asset.
Start marker	Start point of the linear segment.
End marker	End point of the linear segment.
Length	The length of the linear segment.
Length unit	The unit the length of the linear segment is measured in.

6. Select **Save**.
   The linear segments appear in the Linear segments related list.

Associate a discrete asset to a linear asset

Associate a discrete asset to a linear asset in order to query and find these assets from the linear asset at a later point of time.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise asset estate** > **Linear assets**.
2. Open the linear asset record with which you want to associate a discrete asset.
3. Select the Discrete assets related list.
4. Select **New**.
5. On the form, fill in the fields.

Field	Description
Discrete asset	Name of the discrete asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Linear asset	Name of the linear asset that the discrete as set is associated to.
Marker	Marker of the discrete asset. You can either select an existing marker or select the loca tion picker to create a marker. Marker must be within the linear asset bound ary, which is defined by the boundary width of the linear asset.
Description	Description of the discrete asset.

6. Select **Save**.

Find linear asset relationships

You can find relationships between linear assets such as overlapping, continuing, or intersecting assets.

Before you begin

Role required: sn_eam.enterprise_asset_manager

You may want to find a relationship between linear assets to associate them with each other. For example, you want to associate a linear asset with another linear asset such as an intersecting asset, in order to find all intersecting linear assets for the given linear asset. Similarly, you want to associate a linear asset with another linear asset such as an overlapping asset, in order to find all overlapping linear assets for that given linear asset.#Once relationships are found between linear assets, records are created for the related linear assets.

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise asset estate** > **Linear assets**.
2. Open a linear asset record for which you want to find relationships with other linear assets.
3. Select **Find relationships**.
   A confirmation message box appears.
4. Select **Find relationships** in the confirmation message box.
   A search is performed for relationships between this linear asset and other linear assets. A message appears if any relationships have been identified, and for any relationship found, records are created in the Related linear assets related list.
5. Select **Save**.
6. Select the Related linear asset related list to view the identified relationships.
   For each record, the kind of relationship it has with the linear asset is mentioned such as continuing, overlapping, or intersecting.

Create pallet assets in the Enterprise Asset Workspace

Create pallet assets to track and manage the pallets that can transport and store your enterprise, hardware, base, bundle, and consumable assets.

Before you begin

Role required: sn_eam.enterprise_asset_manager or sn_eam.enterprise_asset_technician

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
2. On the **All assets** tab, select **New pallet asset**.
3. On the form, fill in the fields.

Create New Pallet form

Field	Description
Pallet Details	
Vendor	Vendor that the pallet was purchased from. If the pallet was automatically created from a procurement purchase order, the **Vendor** field is automatically set to the same vendor that was specified on the purchase order.
Model	Pallet model that the pallet is associated with.
Asset tag	Alphanumeric value that your organization assigns to the pallet for tracking purposes.
State	Current state of the pallet. This field is automatically set to **In stock**. However, you can also set this field to one of the following options: ○ **In transit** ○ **Retired** ○ **Missing**
Stockroom	Stockroom that the pallet is located in.
Aisle and space	Stockroom aisle and space that the pallet is located in.
Parent	Parent asset of the pallet.
Comments	Message that you want to apply to the pallet.
Pallet type	Type of pallet. Select one of the following options: ○ **Pallet** ○ **Bin** ○ **Box** ○ **Container** ○ **Other**
Substate	Current substate of the pallet, such as **Available** or **Reserved**. The options that are available in the **Substate** field change based the option that you select in the **State** field.
Reserved for	User who the pallet is reserved for.
Location	Physical location of the pallet.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If you set the location to a specific place and then set the *sn_itam_common.sn_enable_indoormap_for_assets* system parameter to **true** on your ServiceNow instance, the pallet asset record, which is generated after you fill in all fields and save this form, includes an interactive map that shows the real-time location of the asset. This map is still included in the pallet asset record when you open the record from an associated work order task or stockroom record. The map does not display by default. To display the map, select the Location map icon on the sidebar of the pallet asset record.
Disposal	
Disposal vendor	Vendor that is assigned to carry out the disposal order for the pallet.
Vendor disposal order ID	ID number that is assigned to the disposal order by the disposal vendor.
Disposal date	Date on which the disposal order is completed.
Resold value	Estimated price that the pallet can be resold for.
Scheduled retirement	Date on which you want to retire the pallet.
Retired date	Actual date on which you retired the pallet.
Beneficiary	Organization that receives the pallet after it is retired.
Resale price	Value of the pallet when it is retired.
Activities	
Work notes	Work notes related to the pallet.

4. Select **Save**.

Add assets to a pallet in the Enterprise Asset Workspace

Add enterprise, hardware, base, bundle, or consumable assets to a pallet so that you can track and manage them as a group.

Before you begin

To add hardware, base, or bundle assets to a pallet, install and activate the Hardware Asset Management application on your ServiceNow® instance. To install and activate the application, request it from the ServiceNow Store.

Role required: sn_eam.enterprise_asset_manager or sn_eam.enterprise_asset_technician

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

You can add an asset to a pallet only under the following conditions:

- The **State** field on the pallet asset record is set to **In stock**.
- The **State** field on the asset record is set to one of the following options:
  - **On order**
  - **In stock**
  - **In transit**
- The **Stockroom** field on the asset record is either empty or set to the same stockroom as the pallet.
- The asset isn't associated with another parent asset.

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
2. On the **All assets** tab, select the pallet that you want to add assets to.
   The pallet asset record opens.
3. Select the **Assets** tab.
4. Add assets to the pallet.
   - To add enterprise, hardware, base, or bundle assets to the pallet, use the following steps:
     a. Select **Add assets**.

        The Add assets dialog box opens.

     b. In the dialog box, select the check box for every asset that you want to add to the pallet.
     c. Select **Add**.
   - To add consumable assets to the pallet, use the following steps:
     a. Select **Add consumables**.

        The Add consumable to pallet dialog box opens.

     b. In the **Consumable** field, search for and select the consumable asset that you want to add to the pallet.
     c. In the **Quantity** field, specify the quantity of the consumable asset that you want to add to the pallet.
     d. Select **Add**.

Result

The assets are added to the **Assets** tab of the pallet asset record.

Remove assets from a pallet in the Enterprise Asset Workspace

Remove any enterprise, hardware, base, bundle, or consumable assets that you no longer want to track and manage as part of a pallet.

Before you begin

To remove hardware, base, or bundle assets from a pallet, install and activate the Hardware Asset Management application on your ServiceNow® instance. To install and activate the application, request it from the ServiceNow Store.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role required: sn_eam.enterprise_asset_manager or sn_eam.enterprise_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
2. On the **All assets** tab, select the pallet that you want to remove assets from.
   The pallet asset record opens.
3. Select the **Assets** tab.
4. From the list of available assets, select the check box for each asset that you want to remove from the pallet.
5. Select **Remove**.

Result

The assets no longer appear on the **Assets** tab.

Using pallet assets to manage your asset inventory in the Enterprise Asset Workspace

You can manage your asset inventory by using pallets and the assets contained within those pallets in your transfer orders, disposal orders, resale orders, and various consumption workflows.

Moving pallets between stockrooms

You can use transfer orders to move in-stock pallets from one stockroom to another. If you're moving a pallet that contains assets, those assets are also moved as part of the same transfer order. If you move only the assets that are contained within a pallet, those assets are automatically removed from the corresponding pallet asset record after the Ready for fulfillment task is closed.

For more information about transfer orders, see Create a transfer order in Enterprise Asset Workspace.

Disposing of pallets

When a pallet is nearing the end of its life cycle or is no longer functional, you can dispose of it using a disposal order. If the pallet contains any assets, you can choose to dispose of the pallet and its assets using any of the following options:

Note: You can dispose of only the enterprise assets and enterprise-based consumable assets that are contained within your pallets. If a pallet contains any hardware, bundle, or hardware-based consumable assets, those assets are automatically updated with a State of Invalid and can't be processed as part of a disposal order.

- Dispose of both the pallet and all assets that are contained within that pallet.
- Dispose of both the pallet and only certain assets that are contained within that pallet. Any assets that you choose to retain are automatically removed from the corresponding pallet asset record.
- Dispose of the pallet but retain all assets that are contained within that pallet. If you select this option, all assets are automatically removed from the corresponding pallet asset record.
- Retain the pallet but dispose of all assets that are contained within that pallet. If you select this option, all assets are automatically removed from the corresponding pallet asset record.
- Retain the pallet but dispose of only certain assets that are contained within that pallet. Any assets that you dispose of are automatically removed from the corresponding pallet asset record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information about disposal orders, see Create a disposal order in the Enterprise Asset Workspace.

Reselling pallets

To help reduce waste and save costs, you can use resale orders to resell any pallets that you're no longer using. If a pallet contains any assets, you can choose to resell the pallet and its assets using any of the following options:

Note: You can't resell any hardware assets, asset bundles, and non-enterprise consumable assets that are contained within your pallets.

- Resell both the pallet and all assets that are contained within that pallet.
- Resell both the pallet and only certain assets that are contained within that pallet. Any assets that you choose to retain are automatically removed from the corresponding pallet asset record.
- Resell the pallet but retain all assets that are contained within that pallet. If you select this option, all assets are automatically removed from the corresponding pallet asset record.
- Retain the pallet but resell all assets that are contained within that pallet. If you select this option, all assets are automatically removed from the corresponding pallet asset record.
- Retain the pallet but resell only certain assets that are contained within that pallet. Any assets that you resell are automatically removed from the corresponding pallet asset record.

For more information on resale orders, see Create an asset resale flow.

Consuming assets within a pallet

Assets that are contained within a pallet can be consumed through various asset workflows.

Return Merchandise Authorization (RMA) flow

A Return Merchandise Authorization (RMA) is an agreement between a buyer and seller that allows the buyer to return, replace, or request the repair of a defective product within the specified warranty period. When an asset within a pallet becomes defective, you can initiate its replacement or repair by using an RMA order. Any assets that you include in an RMA order are automatically removed from the corresponding pallet asset record.

For more information about RMA orders, see Requesting a Return Merchandise Authorization (RMA) for defective enterprise assets.

Local Order subflow

You can source and fulfill asset requests using assets that are available in the requester's local stockroom. When an asset within a pallet is sourced and consumed locally as part of an asset request, it's automatically removed from the corresponding pallet asset record after the Enterprise Confirm asset task is closed.

For more information on sourcing assets from local stockrooms, see Source requests from Enterprise Asset workspace.

Loaner Request flow

If you need to use an asset for only a short period of time, you can request to loan that asset by using a loaner request. When an asset within a pallet is loaned out, it's removed from the corresponding pallet asset record after the Prepare task for the loaner request is closed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information on loaning assets, see Request a loaner asset in Enterprise Asset Workspace.

Leased Asset Return flow

If a contract for a leased asset is nearing its expiration, you can return the leased asset to the asset vendor before incurring any penalty fees. When a leased asset within a pallet is returned to the asset vendor, it is automatically removed from the corresponding pallet asset record after the Shipment task for the asset is closed.

For more information about returning leased assets, see Return a leased enterprise asset.

Swap tasks from the IT Service Management Asset Management application

The ServiceNow® Asset Management application enables you to track and manage your assets. If you use the application to swap an asset within a pallet, that asset is automatically removed from the corresponding pallet asset record after it's swapped.

For more information on the Asset Management application, see Base Asset Management.

Update enterprise assets that have unknown enterprise models

If an enterprise asset is associated with an unknown enterprise model, update it with a known enterprise model so that you can accurately categorize and track it.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

Note: You can update the enterprise model only for serialized and multi-component enterprise assets.

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
2. Select either the **All enterprise** tab or the tab for a specific enterprise asset type, such as **Medical**.
3. From the list of available enterprise assets, select an enterprise asset for which the **Model** field is set to **Unknown Model**.
   The asset record opens. All asset record fields are read-only.
4. On the asset record, select **Update**.
   The To what type of enterprise asset would you like to change? dialog box opens.
5. In the dialog box, fill in the fields.

To what type of enterprise asset would you like to change? dialog box

Field	Description
Type	Enterprise asset type that you want to categorize the enterprise asset under.
Model category	Enterprise model category that you want the enterprise asset to belong to. The enterprise asset can be linked to a corresponding configuration item (CI) based on the enterprise model category that you select.
Model	Enterprise model that you want to associate the enterprise asset with.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select **Update**.
   The dialog box closes and you automatically return to the asset record. If the update is successful, the asset record fields become editable.

   Note: If the selected enterprise asset type, enterprise model category, and enterprise model update the enterprise asset to a user-assembled multi-component asset, the **State** field on the asset record automatically changes to **Build**. The **Assemble** and **Auto assemble** buttons also appear on the asset record. You can use these buttons to initiate the assembly process for the enterprise asset. For more information on user-assembled multi-component assets, see Select assets for user-assembled asset.

Swap assets for parent multi-component asset

Swap child assets that are part of a multi-component asset. You can swap out only one child asset at a time.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

You can swap assets that are in the following states:

- In use, only if the child asset is hot swappable
- In maintenance
- In stock (Substate Defective or Pending repair)

The swap functionality is available only for the parent asset of a multicomponent asset.

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Enterprise model management**.
2. Select a multi-component record.
3. Select the **Assets** tab and select a parent asset.
4. Select **Swap**.
5. In the **Swap asset** dialog box, fill in the details.

   a. In the **Asset to swap out** field, select the child asset that you want to swap.
   The **Asset Tag** and the **Serial Number** fields are displayed. These fields are automatically populated only if the details are available in the Asset [alm_asset] table. Otherwise, you must manually enter the details in these fields to proceed with the Swap action.

   Note: The **Asset Tag** and the **Serial Number** fields aren't displayed for consumables.

   b. In the **Choose stockroom for asset swap** field, select the stockroom from which you want to choose an asset to swap with your asset.

   c. To display assets that are based on substitute models, select the **Include assets based on substitute models** check box.

   Assets of a substitute model are shown in the **Replacement asset** field only if they meet the following criteria:

   - The asset function isn't a loaner or the asset function is empty.
   - The **State** or **Substate** is **In Stock** or **Available**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The potential replacement asset's **Parent** field is empty.
- Stockroom is the same as the value entered in the stockroom field.

When the assets that meet the substitute model criteria aren't shown in the **Replacement asset** field, search for the model name because the search query refreshes with each keystroke.

d. In the **Replacement asset** field, select the asset that you want to swap with.
You can only choose from the similar assets that are available in the stockroom that you selected.

e. In the **Quantity** field, enter the quantity of assets that you want to swap.
This field is automatically populated with the quantity of the asset that you want to swap. However, you can change the value in this field only if the asset is a consumable. For all the other assets, this field is a read-only field. You can't swap more than the actual quantity of the consumable. For example, if you have five consumables, you can either swap less than 5 or swap all the five consumables.

f. Select **OK**.

Result

- The asset is successfully swapped and the new asset inherit the State and Status of the parent asset.
- The state of the swapped-out asset changes to In stock and the substate changes to Pending repair. If the asset is a consumable, the state changes to In stock and the and substate changes to Pending disposal.
- The stockroom of the swapped out asset changes to the stockroom that you selected in the **Choose stockroom for asset swap** field.

Select assets for user-assembled asset

Create a user-assembled asset by selecting assets from the parent asset's stockroom.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Open the user assembled model and open an asset record from the **Assets** tab.
2. Select **Assemble** to open the Select assets dialog box.
3. Fill in the form details.

Field	Description
Model component	The model components associated with the multi-component model.
Quantity	Quantity of the model component.
Asset	Assets from the parent stockroom. For consumable assets, the quantity of the asset in the stockroom is also mentioned.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Action	Indicates if the corresponding model component is required or not. A enabled cross indicates that you can remove the model component. A disabled cross indicates that this is a required model component. If you remove a model component, the Select more model components drop-down box appears allowing you to restore the model components that you removed.

4. Select **Assemble**.
   The assets you selected are added to the parent asset. You can view these assets in the **Child Assets** tab. All consumable assets are displayed as a single record, instead of individual records.

Release assets from the parent asset

Release a child asset that is no longer required to be associated with its parent asset.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

You can release only one child asset at a time from a user-assembled, pre-assembled, or a single asset.

You can release an asset that isn't required or an add-on asset that's in one of the following states:

- In use
- In maintenance
- In stock (Substate as Pending disposal)
- In stock (Substate as Pending repair)

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Enterprise asset estate**.
2. Select the parent asset record from which you want to release assets.
3. Select **Release assets**.
4. In the **Release asset** dialog box, fill in the details.

   a. In the **Asset to release** field, select the child asset that you want to release.
   The **Asset Tag** and the **Serial Number** fields are displayed. These fields are automatically populated only if the details are available in the Asset [alm_asset] table. Otherwise, you must manually enter the details in these fields to proceed with the Release action.

   Note: The **Asset Tag** and the **Serial Number** fields aren't displayed for consumables.

   b. In the **Select stockroom for released assets** field, select the stockroom to which the child asset should be released.

   c. In the **Quantity** field, enter the quantity of assets that you want to swap.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

This field is automatically populated with the quantity of the asset that you want to swap. However, you can change the value in this field only if the asset is a consumable. For all the other assets, this field is a read-only field. You can't swap more than the actual quantity of the consumable. For example, if you have five consumables, you can either swap less than 5 or swap all the five consumables.

Result

- The asset that you released isn't listed in the **Child assets** tab.
- The state of the released asset changes to In stock and the substate changes to Pending disposal.

Create additional child assets

Create additional child assets for the model even if the assets are not defined in the model component.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **Enterprise Asset Workspace** and select either **Enterprise asset estate** or **Enterprise model management** to access the **Child Assets** related list tab.
2. Select **Add** to select assets from a stockroom.
   Add is visible only if the asset is in one of the following states:
   - In Build
   - In Use
   - In Maintenance
   - In Stock Defective
   - In Stock Pending Repair
3. Select a stockroom and assets in the *`Select child asset to add`* dialog box.
4. Select **Add**.

Create a TCO report in Enterprise Asset Workspace

Create a TCO report to compare the actual or projected TCO of assets or to compare the actual or projected asset TCO with the benchmark cost of the enterprise model.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Asset analytics** > **Asset TCO**.
2. Select **New**on the right side of the page.

Field	Description
Name	Name of the report.
Type	The type of report. Choose from the following options:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ TCO comparison: Evaluates cost of multiple group of assets with each other. ○ TCO vs benchmark: Evaluates how efficient ly an asset or group of assets is managed in relation to industry or market standards.
Report Table	The table this report is based on. This is a read-only field with the value **Enterprise as set**.
Total cost type	The total cost type of the report. ○ Actual TCO: The TCO value of the selected asset. ▪ If both Actual TCO and Real time report check boxes are selected, the generated TCO report is real-time based on the Real time report selection. ▪ If only Actual TCO is selected, the gener ated TCO report is offline. ○ Projected TCO: This value is referenced from the following formulas and the generat ed report is only offline. ▪ When useful life of the asset is equal to or greater than asset life, the Projected TCO (at end of life) is calculated by using the following formula: `Normalized TCO * Useful life`, where Normalized TCO (TCO per month) is `(Purchase cost / Useful life) + (Sum of operational cost / Asset life)`. ▪ When useful life of the asset is lower than asset life, the Projected TCO (at end of life) is calculated by using the follow ing formula: `Normalized TCO * Asset life`, where Normalized TCO (TCO per month) is `(Purchase cost + Sum of operational cost) / Asset life)`.
Description	Description of the report.
Show benchmark	Shows the benchmark threshold on the TCO comparison report. This field appears only if you select TCO com parison as your report type.
Benchmark model	The enterprise model for the benchmark threshold.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Real time report	When selected, generates real-time data on the report. You can deselect this check box to make it an offline report.
Workspace	The workspace that you are currently logged into. By default, the value for this field is **EAM**. This is a read-only field.

3. Select **Save**.
   The report is created and the TCO report sources related list appears. You can now add the report sources.

Create a TCO report source in Enterprise Asset Workspace

Create a TCO report source to add report sources to a TCO report.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Asset analytics** > **Asset TCO**.
2. Open the report for which you want to create report sources from the Comparative reports section.
3. Select the TCO report sources tab.
4. Select **New**.
5. On the form, fill in the fields.

Create New TCO report source

Field	Description
Name	Name of the report source
Active	Indicates if the report source is active or not. By default, this check box is selected. **Note:** You can have a maximum of four active report sources for a TCO comparison report at any given time. If you want to add another active report source, you need to inactivate a report source. For a TCO comparison report, you can have a maximum of four active report sources at any given time. If you want to add another active report source, you need to inactivate an existing report source. For a TCO vs benchmark report, you can only have only one active report source.
Report table	The table this report is based on.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Set conditions	Specify a filter to select assets with certain conditions.
Description	Description of the report source.

6. Select **Save**.
   The new report source is added to the TCO report sources tab.

Add calibration attributes to an enterprise asset

Add calibration attributes to an enterprise asset to specify and manage the calibrations that are required for the asset throughout its life cycle.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

You can add calibration attributes at the individual enterprise asset level or at the enterprise model level. Alternatively, you can create common calibration attributes that are not associated with any enterprise assets or enterprise models. For details on how to add calibration attributes to an enterprise model, see Add calibration attributes to an enterprise model. For details on how to create common calibration attributes, see Create a calibration attribute library.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
3. Select either the **All enterprise** tab or the tab for a specific enterprise asset category, such as **Facility assets**.
4. From the list of available enterprise assets, select the enterprise asset that you want to add calibration attributes to.
5. On the **Calibration attributes** tab of the enterprise asset record, select **New**.
6. On the form, fill in the fields.

Create New Calibration Attribute form

Field	Description
Attribute details	
Name	Name of the calibration attribute.
Short description	Brief description of the calibration attribute.
Criticality	Criticality level that indicates how important the calibration attribute is.
Service frequency	Frequency at which you must perform the calibration.
Category	Type of calibration.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: The Enterprise Asset Management application includes default calibration categories such as Electrical, Flow, Humidity, and Pressure. You can create additional calibration categories for any calibrations that do not fall under the default categories. For detailed instructions, see Create a calibration category for your enterprise asset calibrations.
Active	Option that indicates if the calibration attribute is active.
Order	Order in which the calibration attribute applies to the enterprise asset. If your enterprise asset contains more than one calibration attribute, the attribute with the lowest numerical value applies to the asset first. **Important:** You must use a unique numerical value for each calibration attribute.
Calibration properties	
Value type	Method by which you want to measure tolerance conformance. Select one of the following options: ○ **Accuracy % full scale**: Fixed percentage of accuracy that your calibration measurements must fall within at any point within the enterprise asset's full measurement range. The corresponding tolerance limits remain the same at every point within the measurement range. For example, if a measurement range is 100 units and the accuracy percentage is set to ±1%, the tolerance limits are ±1 unit at every point within the measurement range. ○ **Accuracy % point**: Fixed percentage of accuracy that your calibration measurements must fall within at a specific point within the enterprise asset's full measurement range. The corresponding tolerance limits increase or decrease proportionally based on the value of the point that you are comparing your calibration measurement against. For example, if your accuracy percentage is set to ±1% and you want to compare your calibration measurement against a point that has a value of 50 units, the tolerance limits for this specific point are ±0.5 units. If you want to compare your calibration measurement against a point that has a value of 60 units, the tolerance limits increase to ±0.6 units. ○ **Range**: Measurement range that your calibration measurements must fall within. The corresponding tolerance limits are based on the lowest and highest acceptable point values within the range. ○ **Less than**: Value within the enterprise asset's full measurement range that your calibration measurements must fall below. The corresponding tolerance limit is based on the highest acceptable point value within the range. ○ **Greater than**: Value within the enterprise asset's full measurement range that your calibration measurements must lie above. The corresponding tolerance limit is based on the lowest acceptable point value within the range. ○ **True/false**: Option to assess any qualitative elements of the calibration.
Scale	Full measurement range that you're measuring tolerance conformance against. **Note:** This field appears only if you set the **Value type** field to **Accuracy % full scale**.
Unit	Unit of measurement that you're using to measure tolerance conformance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This field appears only if you set the **Value type** field to one of the following options: ○ **Accuracy % full scale** ○ **Accuracy % point** ○ **Range** ○ **Less than** ○ **Greater than**
Accuracy (%)	Percentage of accuracy that your calibration measurements must fall within. **Note:** This field appears only if you set the **Value type** field to either **Accuracy % full scale** or **Accuracy % point**.
Resolution	Smallest distinguishable change in value that you can detect and measure. The higher the resolution is, the more specific the change in value is. **Note:** This field appears only if you set the **Value type** field to one of the following options: ○ **Accuracy % full scale** ○ **Accuracy % point**
Quality standard	
Quality standard	Set of requirements and guidelines that you must follow when performing the calibrations. **Note:** You can create quality standards manually in the Admin center view of the Enterprise Asset Workspace. See Create a quality standard for your enterprise asset calibrations for detailed instructions.
Instrument	
Instrument model	Model of the instrument that you must use to perform the calibrations.
Instruction	General instructions or instrument settings that you must follow when performing the calibrations.

7. Select **Save**.
   The form closes and you are automatically redirected to the new calibration attribute record.
8. Specify the points at which you can measure tolerance conformance.

Important: You must specify one or more points within the enterprise asset's measurement range. If you do not specify at least one point, the calibration attribute cannot be set to Active.

   a. On the calibration attribute record, select **Add calibration points**.
      The Calibration points dialog box opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. In the dialog box, fill in the fields.

Calibration points dialog box

Field	Description
Point name	Name of the point.
Expected value	Value that you want to measure tolerance conformance against. If you set the **Value type** field to either **Accuracy % full scale** or **Accuracy % point** in the Create New Calibration Attribute form, enter the value of the point that you want to measure against. If you set the **Value type** field to **True/false**, select a Boolean value of either **true** or **false**. **Note:** This field appears only if you set the **Value type** field to one of the following options in the Create New Calibration Attribute form. ▪ **Accuracy % full scale** ▪ **Accuracy % point** ▪ **True/false**
Order	Order in which you want to use the point to measure tolerance conformance. If your calibration attribute contains more than one point, the point with the lowest numerical value is calibrated first. **Important:** You must use a unique numerical value for each point.
Lower tolerance	Lowest acceptable value that the calibration measurement can reach to stay in conformance. **Note:** This field appears only if you set the **Value type** field to one of the following options in the Create New Calibration Attribute form: ▪ **Accuracy % full scale** ▪ **Accuracy % point** ▪ **Range** ▪ **Greater than** If you set the **Value type** field to either **Accuracy % full scale** or **Accuracy % point**, this field is read-only.
Upper tolerance	Highest acceptable value that the calibration measurement can reach to stay in conformance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This field appears only if you set the **Value type** field to one of the following options in the Create New Calibration Attribute form: ▪ **Accuracy % full scale** ▪ **Accuracy % point** ▪ **Range** ▪ **Less than** If you set the **Value type** field to either **Accuracy % full scale** or **Accuracy % point**, this field is read-only.

c. To add an additional point to the calibration attribute, select the Add Content icon and then fill in the fields.
Repeat this step for each point that you want to add.

d. Select **OK**.

The dialog box closes and the points appear on the **Calibration points** tab of the calibration attribute record.

9. **Optional:** If your enterprise asset also contains calibration attributes at the enterprise model level, enable this enterprise asset level attribute to override an existing enterprise model level attribute.

a. On the calibration attribute record, select the **Details** tab.

b. In the Identification section of the **Details** tab, select the Search for Record icon next to the **Override** field.
The Override dialog box opens.

c. In the dialog box, select the enterprise model level attribute that you want to override.
The dialog box closes and you automatically return to the calibration attribute record.

d. Select **Save**.

The enterprise model level attribute is removed from the **Calibration attributes** tab of the enterprise asset record.

What to do next

Create work orders to track the calibrations that are made to your enterprise asset. These work orders must use a work order template with tasks that have a Work type of Calibration. For more information on work orders, see Managing work orders for your enterprise assets.

Clone a calibration attribute to an enterprise asset

Clone an existing calibration attribute to an enterprise asset to add a calibration attribute with similar settings.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
2. Select either the **All enterprise** tab or the tab for a specific enterprise asset category, such as **Facility assets**.
3. From the list of available enterprise assets, select the enterprise asset that you want to clone a calibration attribute to or from.
4. On the **Calibration attributes** tab of the enterprise asset record, use one of the following options to clone a calibration attribute:
   - To clone a calibration attribute from this enterprise asset to another enterprise asset, use the following steps:
     a. From the list of available calibration attributes, select the check box for the calibration attribute that you want to clone.
     b. Select **Clone to assets**.
     c. In the Select assets dialog box, select the **Clone as active** check box to automatically set the cloned calibration attribute to active.
     d. Select the check box for the enterprise asset that you want to clone the calibration attribute to.
     e. Select **Clone**.

        The calibration attribute is cloned to the selected enterprise asset.
   - To clone a calibration attribute from another enterprise asset to this enterprise asset, use the following steps:
     a. Select **Clone from**.
     b. In the Select attribute to clone dialog box, select the **Clone as active** check box to automatically set the cloned calibration attribute to active.
     c. Select the check box for the calibration attribute that you want to clone.
     d. Select **Clone**.

        The calibration attribute is cloned to the enterprise asset and appears in the list of available calibration attributes.

Asset conditions in Enterprise Asset Management

Assessing the condition of assets in your organization aids in effective maintenance planning, resource allocation, and managing the asset life cycle.

Overview of asset conditions

You need to evaluate assets based on specific conditions to ensure reliability. Asset health helps your organization in various ways:

- Maximizes asset life.
- Reduces unplanned downtime.
- Improves operational effectiveness and safety.
- Helps to comply with regulations and industry standards.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles for asset conditions

The following are the two new roles added for the asset conditions feature:

- Asset technician (sn_smart_asmt.actor) role added to the Enterprise technician (sn_eam.asset_technician) role
- Asset manager (sn_smart_asmt.template_manager) role added to the Enterprise asset manager (sn_eam.asset_manager) role

Asset condition workflow

The asset condition workflow comprises of the following stages:

Create condition templates

Create condition templates and associate condition attributes that you have defined to a condition template. Create questions and enable scoring in the templates to indicate whether the condition attributes for a model or asset passed or failed. For more details, see Create condition templates for condition attributes.

Define condition attributes

Enterprise asset managers define condition attributes for evaluating models and assets. For more details, see Define condition attributes on enterprise models and assets.

Schedule condition evaluations

The Enterprise asset manager schedules evaluations via maintenance plans or work orders. For more details, see Schedule condition evaluations for enterprise models or assets.

Perform condition evaluations

The technician performs the evaluation via the web interface or through the mobile application. Once the evaluation is complete, a score and a result are calculated. The Enterprise asset manager either accepts or rejects the evaluation. For more details, see Perform condition evaluation from the Enterprise Asset Workspace and Perform condition evaluation from the Mobile Agent application.

View the evaluation reports

The Enterprise asset manager views the report for the evaluation. For more details, see Review the asset condition results.

Plugin dependencies for asset conditions

The following are the plugin dependencies that are required to use asset conditions:

Plugin Name	Plugin ID
app-smart-assessment-core	com.sn_smart_asmt
sn-smart-assessment-connected	com.sn_smart_assessment_connected
sn-smart-assessment-designer	com.sn_smart_assessment_designer
app-smart-assessment-scoring	com.sn_smart_scoring
app-smart-assessment-mobile	com.snc.smart_assessment_mobile
mobile scripted screen	com.glide.sg.scriptedscreen

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Domain separation supported

The asset conditions feature supports domain separation.

Create condition templates for condition attributes

Create a condition template and associate the template to condition attributes for enterprise models and assets.

Before you begin

Role required: Asset technician (sn_smart_asmt.actor) and Asset manager (sn_smart_asmt.template_manager).

About this task

Create condition templates before defining condition attributes on enterprise models and assets.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, navigate to one of the following views:
   - Admin center view
   - Enterprise asset estate view
   - Enterprise model management view
3. Depending on the view you are in, perform the following steps:
   - Admin center view: In the navigation panel of the Admin center view, navigate to **Asset condition configuration** > **Asset condition templates** and then select **New**.
   - Enterprise asset estate or Enterprise model management view: Select the **All enterprise** tab or the tab for a specific model or asset category, such as Construction. Open an enterprise model or asset, select the **Condition attributes** tab, select **New**, and then select **Create assessment template**.
4. In the Create new assessment template dialog box, enter a name for the template.
5. Select **Create**.
   The fields in the **General** tab are automatically populated.

   The template opens in the Assessment Workspace that belongs to the Governance, Risk, and Compliance application.

   The fields in the **General** tab are automatically populated.
6. Select the **Scoring** tab to add scores to the overall template.
   Scoring helps to evaluate the condition of assets and indicates whether the condition evaluation passed or failed. Scoring can be also added for each section in the **Questions** tab and also for each question.
7. Select **Enable scoring**
   You must enable scoring to make results available for the condition attributes. For more details on scoring, see Create Smart Assessment templates for BIA.
8. After entering the details in the **Scoring** tab, select **Save**.
9. Select the **Questions** tab to create sections and questions.
   You can create sections and questions in this tab and enable scoring for any specific section and for individual questions. For more details on creating questions, sections, and scoring, see Create Smart Assessment templates for BIA.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

10. After entering all the details in the **Questions** tab, select **Save**.
11. Select **Publish**

    The questions and scores are published. Publishing finalizes the template and makes the template ready to be used for evaluation.

    If you don't publish the template, the template won't be available in the condition template picker when creating condition attributes.

Define condition attributes on enterprise models and assets

Define the conditions to be inspected on enterprise models and assets throughout their life cycle.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

Once condition attributes are defined on an enterprise model, all the assets for that models inherit the condition attributes.

Before defining condition attributes, create a condition template from the Admin center view. You can also create condition templates while defining condition attributes from the enterprise asset or enterprise model page.

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace**.
2. Navigate to either of the two views.
   - Enterprise asset estate: For adding condition attributes to an asset.
   - Enterprise model management: For adding condition attributes to a model.
3. Select either the **All enterprise** tab or the tab for a specific model or asset category, such as Construction.
4. From the list of available enterprise models or assets, open the enterprise model or asset that you want to define the condition attributes on.
5. Select **New** on the Condition attributes related list.
6. On the form, fill in the fields.

Create New Condition Attribute form

Field	Description
Attribute details	
Name	Name of the condition attribute.
Model or Asset The Model field appears in the Enterprise model management view. The Asset field appears in the Enterprise asset estate view.	The model or asset the condition attribute is being added to.
Short description	Brief description of the condition attribute.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Weight	Desired weight for each line. The total sum of weights for all lines of an asset should equal one.
Attribute type This field appears only in the Enterprise asset estate view.	Type of attribute.
Category	Type of condition. **Note:** The Enterprise Asset Management application includes many default condition categories such as Area, Concentration, Density, and Electrical.
Condition template	The template that the condition is associated with. You can select an existing template or select **Create condition template** to create a template.
Criticality	Criticality level that indicates how important the condition attribute is.
Service frequency	Frequency at which you must perform the condition.
Pass condition minimum	Enter a minimum numerical value for the condition to pass. The value can't be less than zero.
Pass condition maximum	Enter a maximum numerical value for the condition to pass. The value can't be more than 100. For example, if you enter the value 100 in this field and the value 0 in the **Pass condition minimum** field, then if the overall score is between this range of 0-100, the result indicates that the condition passed.
Order	Order in which the condition attribute applies to the enterprise model or the asset. If your enterprise model or asset contains more than one condition attribute, the attribute with the lowest numerical value applies to the model or the asset first.
Active	Option that indicates if the condition attribute is active. Select this check box.

7. Select **Save**.
   The form closes and you're automatically redirected to the new condition attribute record.

Create an asset group in Enterprise Asset Management

Create asset groups to create a logical group of entities that includes assets, locations, and users.

Before you begin

Role required:sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
3. Select the **Asset groups** tab.

   This tab contains the following subtabs:

   - **Asset groups**: Create and manage asset groups across your organization. This subtab is further classified into the following sites:
     - Unassigned sites: sites not assigned to any asset group.
     - Assigned sites: sites assigned to an asset group.
   - **Sites**: View equipment model entities that are picked up from the Equipment model [cmdb_ci_ot_isa_entity] table. The Equipment model table is a descendant of the Application Service CI [cmdb_ci_service_auto] table.

     For more information about sites, see Create a site in the Enterprise Asset Management application.
4. On the **Asset groups** subtab, select **New**.
5. On the form, fill in the fields.

Create New Asset group form

Field	Description
Name	Name of the asset group.
Service instance	Reference that you can assign to the asset group. This creates a bridge between the CI and the assets. If you assign a reference to the asset group, then the asset group is bound by the reference to the selected Service instance.
Description	Brief description of the asset group.
Parent	Parent group of the asset group.
Location	Specific geographical location of the asset group.
Site	Equipment model entities that are picked up from the Equipment model [cmdb_ci_ot_isa_entity] table.
State	The current state of the asset group. By default, a newly created asset group is in the **Build** state.
Substsate	The substate of the asset group.
Support group	The group to contact if you encounter any issues with the asset group.
Supported by	The person who can be contacted within the support group for any issues that you may encounter with the asset group.

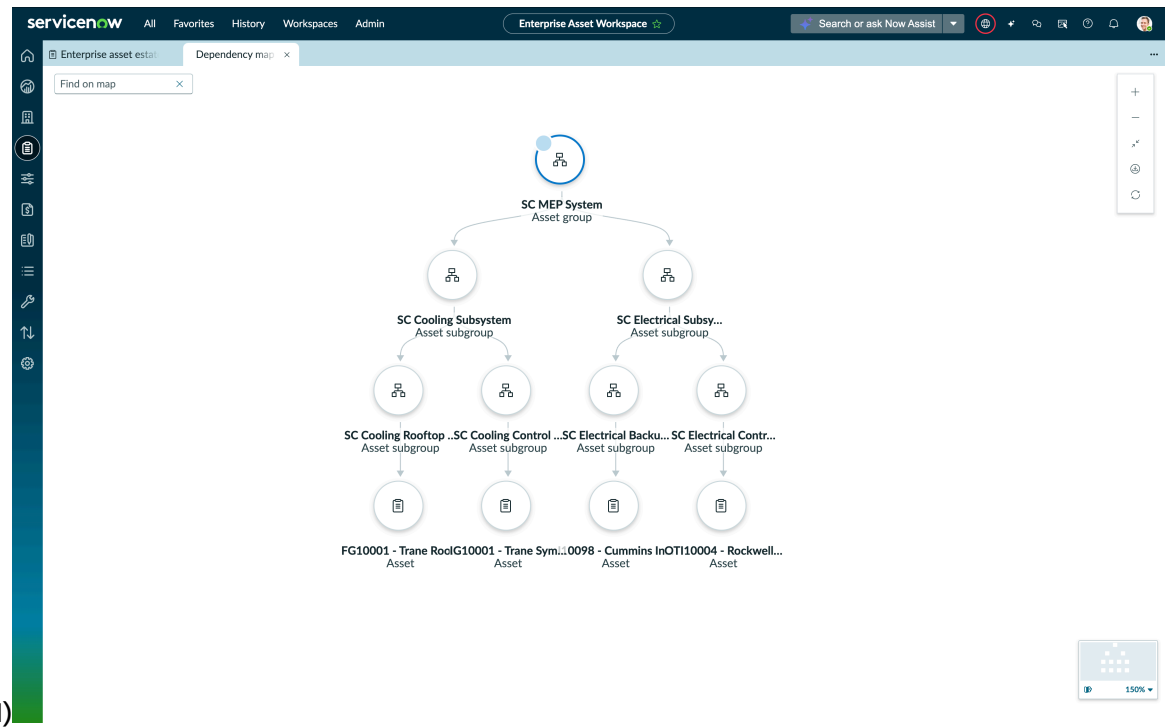
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Department	Department to which the asset group belongs.
Company	Company or organization to which the asset group belongs.
Owned by	Person who has financial ownership of the asset group. This can be different from the person in the **Managed by** field.
Managed by	Person who maintains the asset group. This can be different from the person in the **Owned by** field.
Assigned to	Person using or primarily responsible for this asset group. This field is visible when the asset state is **In Use**.
Assigned	Date on which the asset group was assigned to a user.
Installed	Date on which the asset group was assigned to the person mentioned in the **Assigned to** field.
Retired date	The date this asset group is retired.
Comments	Any comments to add.

6. Select **Save**.
   The asset group record opens with related lists for adding subgroups and assets.

7. **Optional:** Select the View dependency map icon, , next to an asset group, in the Asset groups page, to view the relationship between an asset group, subgroups, and assets.

(Optional)



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you have the sn_cmdb_user role, you can further drill down by selecting the dependency map icon. For example, in the screenshot, select the dependency map icon on the Surgery Room 1 node to further drill down. Additionally, if you have the app_service_admin role, you can view the **Related items** contextual panel on the right side of the Dependency map page.

Create an asset subgroup in Enterprise Asset Management

Create a subgroup to add child asset groups to an asset group.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

You can add or remove a subgroup from an asset group.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
3. On the **Asset groups** tab, select the **Asset groups** subtab.
4. Open the asset group record for which you want to create a subgroup.
5. Select the Subgroups related list.
6. Select **New** on the Create New Asset group page.
   The **Parent** field is automatically filled with the parent asset group.
7. On the form, fill in the required details.
   For more details on the fields, see Create an asset group in Enterprise Asset Management.
8. Select **Save**.
   The subgroup is created and is listed in the Subgroups related list.

Add assets to an asset group or subgroup

Add existing assets to an asset group or subgroup.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
3. On the **Asset groups** tab, select the **Asset groups** subtab.
4. Open the asset group record to which you want to add assets.
5. Select the Assets related list.
6. Select **Add** to open the Add asset dialog box.
   For details on the type of assets that appear, see the section titled Considerations for adding assets to asset groups.
7. Select the assets that you want to add.
   You can also use the condition builder to search for specific assets.
8. Select **Add**.
   The selected assets are added to the asset group and are listed in the Assets related list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create consumable assets in Enterprise Asset Workspace

Create consumables in the Enterprise Asset Workspace to track enterprise assets.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise asset estate** > **Consumable**.
2. Select **New**.
3. Select the type of the consumable and the model category from the **Type** and**Model category** drop-downs.
4. Select **Create**.
5. Fill in the details in the Create New Consumable page.

Field	Description
Display name	Name of the asset.
Model	Product model of the asset.
Model category	Model category of the asset.
Parent	The parent asset. When a parent asset is defined, the **Assignment** and **State** fields of the child asset are automatically populated based on the **Assignment** and **State** fields of the parent asset and are read-only.
Quantity	Amount of items the asset represents.
General	
State	State of the asset. The default state is set to **Build**.
Substate	Substate of the asset.
Asset function	The purpose for which the asset will be used.
Planned for disposal	Indicates if the asset is slated for disposal.
Stockroom	Stockroom where the asset resides.
Location	Location of the asset.
Aisle and space	The aisle and space in the stockroom where the asset resides.
Expenditure type	The type of expenditure. Choose from the following options: ○ **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. ○ **Opex**: Operational expenditure is an on-going expenditure. For example, toners for the photocopier.
Assigned to	The person the asset is assigned to
Cost	Price that the asset was purchased for.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Cost Center	Cost center financially responsible for the asset.
Asset Disposal	
Disposal order number	A unique number assigned to the asset disposal order.
Disposal vendor	The vendor assigned to carry out the asset disposal order.
Vendor disposal order ID	Order number assigned by the vendor assigned to carry out the asset disposal order.
Disposal date	The date when the asset disposal order process is completed.
Resold value	Estimated cost the disposal asset can be resold for.
Scheduled retirement	Scheduled date on which the asset is retired.
Resale price	Value of the asset when it is retired.
Beneficiary	Organization that receives the asset when it is retired.
Activities	
Work Notes	Work notes related to the asset.

6. Select **Save**.
   The consumable asset is created and appears in the Consumable assets list.

Use consumable assets in Enterprise Asset Workspace

To use consumable assets, ensure that they are in the **In stock** state and **Available** substate.

Before you begin

Note: Only consumables created from models in the Enterprise Asset Management application can be used if the **Asset strategy tracking** for the model is set to **create consumable asset**.

Role required: asset

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise asset estate** > **Consumable assets**.
2. Select a consumable asset with a state of **In Stock** and a substate of **Available**.
3. Select **Consume**.
   The Consume dialog box appears.
4. Enter the quantity to consume in the **Quantity** field.
5. In **Asset** list, select the lookup icon and select the asset associated with the consumable.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Example
For example, a mouse tracked as a consumable asset can be associated with a non-consumable asset such as a computer.

6. In **User** list, select the lookup icon and select a user associated with the consumable.
7. Select **OK**.
   On the **Consumable** form, the **Quantity** field shows the reduced number. The Consumables list contains two records for the consumable in the specific stockroom: one with a state and substate of **In Stock** and **Available** (if you did not consume the entire quantity), and one with a state of **Consumed**. If a consumable is not in the process of being transferred to a different stockroom and information in the data record is the same, similar records merge automatically. After a consumable is consumed, the record remains in the system for reporting purposes.

Dispose consumable assets in Enterprise Asset Workspace

Dispose of those consumable assets that are no longer required in your stockrooms.

Before you begin

Role required: asset, itil, itil_admin
Know that the Planned for disposal column in the Consumable [alm_consumable] table indicates if the consumable asset is marked for disposal or not.

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise asset estate** > **Consumable assets**.
2. Open a consumable asset record and select **Mark for disposal**.
   Mark for disposal appears only for consumable assets that are in the in-stock state and not marked for disposal.
3. In the Mark for disposal dialog box, enter the total quantity or partial quantity of the consumable asset.
   If you enter a partial quantity, a new consumable record is created with the substate as pending disposal. If you enter a total quantity, the consumable's record substatus changes to "pending disposal" and you return to the same consumable record.
   After you mark the consumable asset for disposal, **Mark for disposal** no longer appears.

   Note: Only a consumable marked for disposal is included in a disposal order. After you mark a consumable for disposal, it does not get merged with another consumable record.

Create an asset onboarding process

Create an asset onboarding process to walk you through the process of entering important information for assets.

Before you begin

The asset onboarding process is a playbook experience that provides an interactive user interface to complete a process. The asset onboarding process is triggered after an onboarding task is created. An onboarding task can be automatically created from the asset request flow or manually created from an asset record.

Onboarding is available only for preassembled and simple assets. Also, only the parent preassembled asset can be onboarded; not the child preassembled assets.

The asset onboarding process is organized into lanes. The lanes appear in the left pane of the page. Each lane includes a few activities that you're asked to complete. Use the following buttons to skip, save, or complete a task:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Skip**: takes you to the next activity.
- **Save**: saves the information but doesn't complete the activity.
- **Mark as complete**: saves the information and completes the activity, and takes you to the next lane.

Note: You can close an onboarding task only after you've skipped all the activities or marked all them as complete.

While you're performing a particular activity, a status of **In progress** appears for that activity. As you mark an activity complete, the status of that activity changes to complete. After you complete all the activities in a lane, you move to the next lane.

The **Onboard asset** button that triggers an onboarding task only appears when the asset is in any one of the following states or substates as listed in the following table.

State	Substates
• Build • In use • In stock • In maintenance	• Available • Reserved • Pending Install • Pending transfer

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Enterprise asset estate**.
2. Open the asset record for which you want to create an onboarding process.
3. Select **Onboard asset**.
   The asset onboarding task opens.
4. Select the **Onboarding playbook** related list tab.
   The asset onboarding page opens.
5. Review or enter details in the Asset details lane.

   Note: If you're onboarding a preassembled industrial asset, the **MAC address** field is included in the Asset details. Also, the **Child assets** activity under Asset details is displayed only for preassembled industrial assets.

   If you have activated the OT Asset Management application, the Asset details activity displays the **MAC address** field for preassembled industrial assets and the hardware assets.

6. Select **Skip**, **Save**, or **Mark as complete** to proceed to the next lane.
7. Continue to review or enter details in the lanes until you reach the last lane.
8. After all the lanes show a status of skipped or complete, select **Close Task** to complete the asset onboarding process.
   Your asset is successfully onboarded.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

View an automatically created onboarding task

View an automatically created asset onboarding task.

Before you begin

Onboarding tasks for assets are automatically created after the asset is received in the Asset Request flow. The onboarding task in turn triggers the asset onboarding process. For each sourced asset, a separate onboarding task is created.

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Asset operations** > **Procurement** > **Requests**.
2. Open a request.
3. Select the **Requested items** tab and open a requested item.
4. Select the **Asset tasks** tab.
   An onboarding and a deploy asset task are listed.
5. Open the onboarding task.

Track assets using indoor maps in the Enterprise Asset Workspace

Use indoor maps to locate and track the enterprise assets, consumable assets, and pallets that are deployed across your organization. Each indoor map consists of an interactive interface that enables you to visualize where your assets are located within your campuses, buildings, floors, and places.

Before you begin

To use indoor maps in the Enterprise Asset Workspace, you must fulfill all the requirements specified in Indoor maps in Enterprise Asset Management.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
2. Select the **Asset indoor map** tab.
   This tab contains an interactive map that enables you to view the real-time location of each enterprise asset, consumable asset, and pallet within a specific floor or place.
3. Set the map to a specific floor by using the Campuses, Buildings, and Floors filters.
   By default, the map provides a high-level view of all campuses that are available across your organization. This default map view doesn't display the locations of your assets. To view the locations of your assets, you must set the map to the floor that those assets are located in. To set the map to a specific floor, select the appropriate values in the Campuses, Buildings, and Floors filters.
4. **Optional:** Specify the assets that you want the map to display the locations of.
   By default, the map displays the locations of all enterprise assets, consumable assets, and pallets that are deployed across your organization. If you want the map to display the locations of only certain assets, use the following steps:

   a. Select the Filters Tab icon on the sidebar of the map.

   b. In the Filter by window, use any of the following filters to narrow down the assets that you want to display the location of:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Department**: Department that the asset belongs to.
- **User**: User who the asset belongs to.
- **Model category**: Model category of the asset.
- **Classification**: Classification code that is assigned to the asset model.

5. **Optional:** Change the format through which you view your asset locations by selecting a display option at the bottom-right corner of the **Asset indoor map** tab.
   The **Asset indoor map** tab supports the following display options:
   - **Show map only** (default display option): Displays an interactive map that shows the locations of the assets within the specified floor.
   - **Show list only**: Displays the list of assets that are located within the specified floor.
   - **Show map and list**: Displays both the interactive map and the list of assets.
6. Use the interactive map or the list of assets to view the real-time locations of assets within the specified floor or place in that floor.
   Select an asset from the map or list to view additional details about that asset.

Use Advanced Shipment Notification in Enterprise Asset Management

Use Advanced Shipment Notification (ASN) to automate and create enterprise asset records for when your assets are in transit.

Before you begin

Download your ASN template and have your asset vendor update it. Upload the updated template to your ServiceNow instance. Before using the ASN template to import asset records, ensure that your ServiceNow instance has the model ID defined and that the same model ID is mentioned in the template.

Role required: sn_eam.enterprise_admin

About this task

Creating enterprise asset records manually is time consuming and can lead to errors. Use ASN to reduce the risk of shipment going missing or misplaced and increase inventory accuracy.

If the asset records that you want to create belong to model categories linked to a CI class with identification rules defined for fields like the Asset tag, Serial number, or MAC address, you must provide details for at least one of these fields in the ASN template. Otherwise, the asset record won't be created. For example, if identification rules are defined for the Serial number and MAC address, you should provide a value for either of these fields.

The identification rules for a CI class are defined in the CMDB Identification and Reconciliation engine (IRE). For more details, see Identification rules and Create a CI identification rule. These rules help to uniquely identify the asset through these required fields and maintain accurate asset records.

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Procurement** > **Advance shipment**.
2. Select **New**.
   The Create New Shipment Notification Upload page appears.
3. Enter a unique name for the ASN in the **Name** field.
4. Select **Attach File** to upload a spreadsheet (.xlxs).
   The spreadsheet should be in the format of the download template. If you do not have a sample spreadsheet, select **Download template** to download a sample spreadsheet, fill in

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

the details in the spreadsheet, and then select **Attach File** to upload the spreadsheet. Ensure that in the spreadsheet the format for **Ship date**, **Order date**, and **Warranty end date** fields is `month/date/year`.

Note: From the Yokohama release onward, the Download template for Advanced Shipment Notification includes the **MAC address** field. After a successful import, the MAC address that you provided in the template is added to the **MAC address** [mac_addr] field in the Asset [alm_asset] table.

Starting with the Zurich release, the Download template for Advanced Shipment Notification includes the **OT entity** column. When this column is set to **TRUE** for hardware models, it creates OT hardware assets in the OT Asset Workspace.

The upload may take some time. Once the file is uploaded, the name of the spreadsheet appears in the **File** field.

5. Select **Import** to perform a validation check on the spreadsheet.

   After you select **Import**, the **Status** field changes from **Draft** and moves to **Pending**, **Extracting Rows** and **Importing**. Once the import process is completed, the status changes to either **Completed**, **Completed with errors**, or **Failed**.

   The **Shipment Upload Result** section appears that gives information on the import process. Information such as how many records were inserted, ignored or skipped.

6. Select **Shipment Notification Upload Stagings** related link to view any errors you received as well as to view the details of the spreadsheet that you uploaded.
7. If you got an error, select the record in **Shipment Notification Upload Stagings** related link.
8. Scroll down to the **Errors** section and view the error in the **Comment** field.
9. Fix the error, upload the spreadsheet, and import the record again.
   Serialized assets do not have duplicate enterprise import records created, but consumables do have duplicate entries.

View and add enterprise asset shipments

Use the Shipments list to view all active enterprise asset shipments from a central location. If an existing shipment doesn't appear on the list, you can add it manually.

Before you begin

Role required: sn_eam.enterprise_asset_technician, sn_eam.enterprise_asset_manager, or sn_eam.enterprise_admin

Note: Only the sn_eam.enterprise_admin role can add shipments manually.

About this task

You can view and add shipments for your transfer orders, purchase orders, move orders, Return Merchandise Authorization (RMA) orders, disposal orders, resale orders, recall orders, reclamation requests, Advanced Shipment Notifications (ASNs), and lease contracts.

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. From the left navigation menu of the Asset operations view, navigate to **Shipment** > **Shipments**.
3. View the complete list of active enterprise asset shipments.
   Select a shipment to view additional shipment details, including the shipment source and associated enterprise assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. If an existing enterprise asset shipment doesn't appear on the list, add it manually.

   a. Select **New**.

   b. On the form, fill in the fields.

Create New Shipment form

Field	Description
Shipping carrier	Shipping carrier through which the enterprise assets were shipped.
Ship date	Date and time at which the enterprise assets were shipped.
Shipped from	Geographic location that the enterprise assets were shipped from.
Receive date	Date and time at which the shipment was received.
Tracking number	Tracking number that enables you to track the status and location of the shipment.
Shipped by	User who shipped the enterprise assets.
Shipped to	Geographic location that the enterprise assets were shipped to.
Received by	User who received the shipment.
Ignore stale check	Option to ignore stale checks for the shipment.

   c. Select **Save**.

Zebra MotionWorks RFID integration for Enterprise Asset Management

You can integrate your ServiceNow instance with third-party Zebra MotionWorks location solutions to import and view real-time radio-frequency identification (RFID) location data for your enterprise assets.

RFID is an asset tracking technology that uses radio frequencies to transfer location and identification data for your assets. This data is stored and transferred through RFID tags, which are small devices that are either attached to or embedded in each asset. Each RFID tag consists of the following components:

- An antenna that receives and transmits radio frequencies so that you can transfer location and identification data for the associated asset. The antenna receives and transmits these radio frequencies each time you scan the RFID tag.
- A unique microchip or integrated circuit (IC) that stores location and identification data for the associated asset.
- A substrate that holds the other two components together.

Zebra MotionWorks location solutions use RFID technology to track the real-time locations of your assets and inventory automatically. When you integrate your ServiceNow instance with Zebra MotionWorks location solutions, this RFID location data is imported into your instance so that you can identify and track your enterprise assets. Any data changes that Zebra MotionWorks location solutions detect are automatically updated on your ServiceNow instance.

For more information on Zebra MotionWorks, refer to the Zebra MotionWorks Location Solutions website.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Importing RFID location data from Zebra MotionWorks location solutions

When you import RFID location data from Zebra MotionWorks location solutions, the data is added to the RFID Stage Asset [sn_itam_common_rfid_stg_asset] table based on the enterprise assets that it is associated with. The Enterprise Asset Management application automatically creates a separate table entry for each enterprise asset that you import this RFID location data for.

After the RFID location data is added to the RFID Stage Asset [sn_itam_common_rfid_stg_asset] table, the Enterprise Asset Management application uses the RFID Resource Data transform map to process and then map this data to the RFID Asset [sn_itam_common_rfid_asset] table. However, RFID location data can be mapped to the RFID Asset [sn_itam_common_rfid_asset] table only for enterprise assets that contain serial numbers.

On successful mapping, you can run the *RFID Asset Mapping Job* scheduled job daily or on-demand to then map the resulting data from the RFID Asset [sn_itam_common_rfid_asset] table to the Asset [alm_asset] table. However, this data mapping is dependent on the existence of corresponding asset records within the Asset [alm_asset] table.

- If a corresponding asset record already exists for an enterprise asset that you want to map data for, it automatically updates each time the RFID location data for that enterprise asset changes. In addition, the **Status** of the enterprise asset changes from **New** to **Matched** in the RFID Asset [sn_itam_common_rfid_asset] table.

- If a corresponding asset record does not already exist, data for that enterprise asset cannot be mapped from the RFID Asset [sn_itam_common_rfid_asset] table to the Asset [alm_asset] table. The **Status** of the enterprise asset changes from **New** to **Unmatched** in the RFID Asset [sn_itam_common_rfid_asset] table.

  You can view and take action on these unmatched enterprise assets by using the **Unmatched RFID tags** important action that appears on the **Overview** tab of the Enterprise asset estate view. For more information on the Enterprise asset estate view, see Enterprise asset estate overview for Enterprise Asset Workspace.

You can view your asset records in the Enterprise asset estate view of the Enterprise Asset Workspace. For details on the RFID fields that are included in each asset record, see Asset fields for enterprise assets.

Note: If you are importing RFID location data for parent enterprise assets with one or more child enterprise assets, RFID location data for those child enterprise assets is based on the RFID tags that they are associated with.

- If a child enterprise asset contains an RFID tag, RFID location data for that asset is based on that RFID tag.
- If a child enterprise asset does not contain an RFID tag, RFID location data for that asset is based on the RFID tag of the parent enterprise asset. If you remove the parent enterprise asset, all RFID location data is cleared for the child enterprise asset.

View the asset hierarchy in the Enterprise Asset Workspace

View the hierarchy details of a multi-component asset in a tree-like format in the Enterprise Asset Workspace.

Before you begin
Role required: sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task
The Asset hierarchy option is shown only for an asset associated with a parent asset or that has child assets.

The asset hierarchy shows consumable assets associated with a parent asset.

Note: Asset hierarchy is not applicable to Linear assets and Pallets.

Procedure
1. Navigate to **All** > **Enterprise Asset Workspace** > **Enterprise Asset Estate**.
2. Select the asset record.
3. Select the Asset hierarchy icon on the contextual sidebar.
   - The asset hierarchy is shown in a tree-like format.

     The default view shows up to three child assets. A number at the right of the asset shows the total number of child assets. If that number is higher than three, view all of them by selecting **Expand all** or **Show More**.
   - The asset for which the hierarchy is shown is highlighted in the asset hierarchy tree.

View the total time worked on all tasks related to an enterprise asset

Use the Asset task time summary report to see the details of the time spent on all tasks for an asset and its child assets, grouped by task category.

Before you begin
Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

About this task
Asset task time refers to the total time spent on all tasks related to an asset. The total time spent includes the sum of time worked on all related tasks for the asset and its child assets.

Note:

Time spent on tasks related to child assets is rolled up to the parent asset only if the tasks were created and closed after the **last_used** date on the child assets. The total time from these tasks is then aggregated and added to the parent asset's time spent.

When a child asset is removed from a parent asset, the total time spent on the parent asset remains the same. Therefore, the time spent lines associated with the parent asset will be available even after the child asset is removed.

The time worked on a task is tracked after you start working on it and select **Start Timer** until you close the task. The timer automatically stops when you close the task, and the total duration is updated. You can also pause the timer when you aren't working on the task by selecting **Pause**, and then select **Resume** when you continue to work on the task. You can also add time worked details to the task manually by selecting **Record Time**. The time worked on a task is stored in the Time worked [task_time_worked] table.

After a task is closed on a parent or child asset, a time spent line is generated and stored in the Time spent line [sn_itam_common_time_spent_line] table. Each time spent line includes the time worked on the asset task. The sum of the time spent values in these time spent lines gives the total asset task time. If a task involves multiple assets, the total time spent is equally divided among them. This equally distributed time is then aggregated to the parent asset if there are any child assets involved.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: When you upgrade to Enterprise Asset Management version 9.0.0, the *Calculate asset time spent* fix script creates time spent lines for asset tasks that have already been completed and closed.

The total time spent is grouped by the following task categories:

- **Purchase - Asset**: Includes the following tasks
  - All tasks in the Refresh flow except the Reclaim aged asset task.
  - Replacement task in the Return Merchandise Authorization (RMA) flow
  - Replacement task in the Recall flow
- **Labor - Maintenance**: Includes Calibration and Planned maintenance in the Work order workflow.
- **Labor - Repair**: Includes tasks in the following workflows:
  - Work order (Breakfix work type)
  - Repair order
  - RMA order
  - Recall order (only the Repair task)
  - Incident
- **Labor - General**: Includes tasks in the following workflows:
  - Asset reclamation
  - Resale
  - Disposal
  - Lease return
  - Transfer order
  - Recall order (except the Repair task)
  - Move order
  - Loaner
  - Asset onboarding
  - Work order (Install task)
  - Asset refresh flow (only the Reclaim aged asset task)
  - Asset request (Pick task)
  - Drop off and Receive task

Note: Total time spent on an asset task isn't calculated for pallets, consumables, and bundle assets. Therefore, the Asset task time summary report isn't available for these assets.

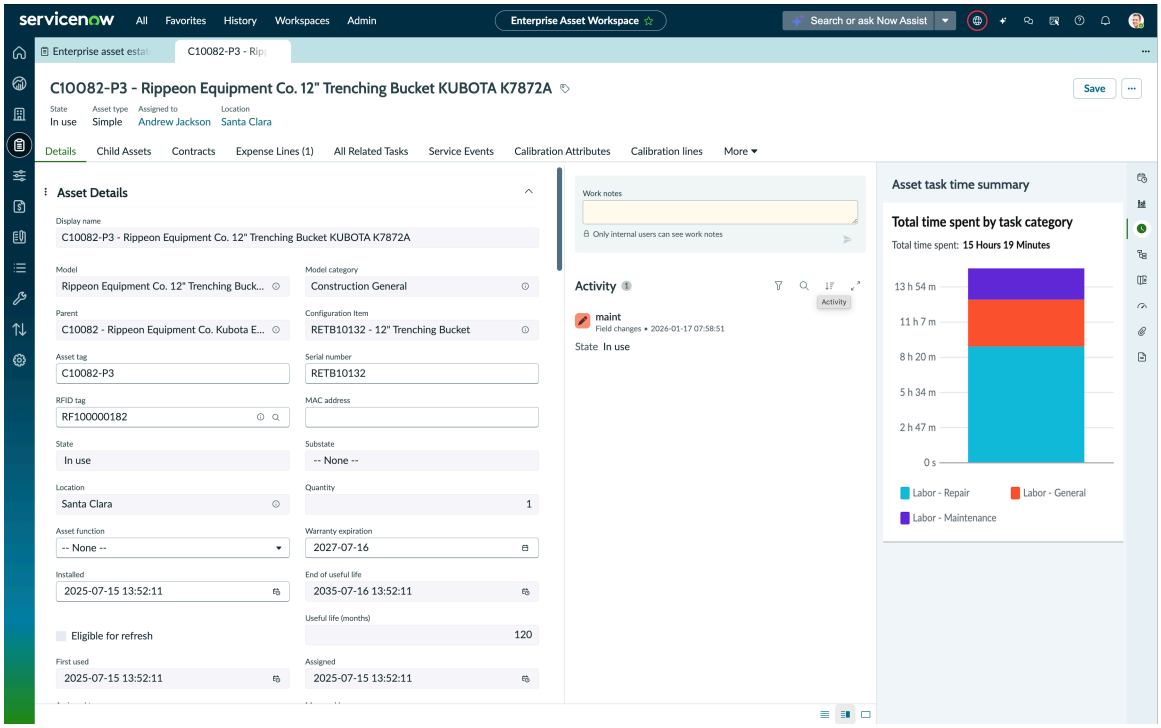
About this task

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Enterprise asset estate**.
2. Select the **All assets** tab.
3. Select the asset record for which you want to view the details of the total time spent on the tasks.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. On the contextual sidebar, select the Asset task time summary icon .
Total time spent by task category report is displayed.



The Asset task time summary report includes the following details:

- **Total time spent**: Total time worked on all related tasks for the asset, including tasks on child assets.
- Breakdown of total time spent: Total time worked on all related tasks, divided and shown separately for each task category. This visualization helps you to see how much time was spent on tasks within each task category.
- Legends for the task categories: Legends shown are based on the actual asset tasks and their task categories. The legends include the following:
  - **Purchase - Asset**
  - **Labor - Maintenance**
  - **Labor - Repair**
  - **Labor - General**

5. To view the details of the time spent on all tasks within a specific task category, select the corresponding task category section in the report.
The list of time spent lines is displayed, with each line showing the following details:
   - **Source asset**: Display name of the asset, including both parent and child assets, for which time was spent on the task.
   - **Task**: Task number
   - **Task type**: Type of the task, such as the Enterprise RMA Order Line task.
   - **Task name**: Name of the task, such as Prepare or On-site repair.
   - **Time spent**: Time worked on the asset task.
   - **Short description**: A brief description of the task.
   - **Closed**: The date and time when the asset task was closed.
   - **Task category**: Category to which the task belongs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset performance reports in the Enterprise Asset Workspace

Gain insights into the overall operational efficiency of your organization's enterprise assets by using the asset performance reports available in the Asset analytics view.

Asset performance involves assessing how effectively and efficiently assets fulfill their intended functions within an organization. The evaluation includes measuring and analyzing key performance indicators (KPIs), such as:

- Asset availability to determine when the asset is operational.
- Mean time between failures (MTBF) to measure reliability.
- Mean time to repair (MTTR) to measure repair efficiency.
- Total asset task time summary to measure the total time worked on the related tasks for an asset and its child assets.

Benefits of tracking asset performance

Reduce unplanned downtime

Monitoring asset health in real-time help prevent and predict issues before they cause downtime.

Improve maintenance efficiency

Metrics like MTTR and MTBF help you schedule maintenance more effectively, reducing wasted time, and improving technician efficiency.

Maximize asset life and return on investment (ROI)

By detecting early signs of wear and tear and scheduling timely repairs, organizations can make their equipment last longer and delay the need for replacements.

Enhance financial planning

Insights into performance help identify models or locations that aren't performing well or have ongoing problems, guiding better investment choices.

Align operations with service levels

Tracking availability helps assets meet the required uptime targets set by service level agreements (SLAs), compliance standards, or production schedules.

Considerations, requirements, and limitations

- The **First Used** field on EAM assets must contain a valid timestamp for accurate asset performance tracking. Assets with missing or invalid First Used values are excluded from performance calculations, creating gaps in lifecycle and utilization reporting.
- Asset key performance indicators (KPIs) aren't calculated for pallets, consumable, and bundle assets.
- Asset KPIs aren't calculated by default.
- To track the asset KPIs that include Asset availability, MTBF, and MTTR, you must perform the following configurations:

1. Opt in to the model categories of the assets for which you want to monitor the KPIs.

> **Note:** If a model category has child categories, selecting the parent category for performance tracking doesn't automatically include the child categories. You should opt in to the specific child categories you want to track.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Define an operation schedule, which is a collection of schedule entries that specify the operational status and total operational duration for any entity that references the schedule. The schedule entries define calendar hours of operation within a schedule.

   For details, see Create an operational schedule for enterprise assets

   Note: If an operational schedule isn't defined, the Default operation schedule is applied.

3. Create an Asset schedule to associate the assets with an operational schedule.

   Note: If an asset isn't associated with an operational schedule, the Default asset schedule will be applied.

- The calculation of asset KPIs for enterprise assets begins when the asset transitions to the In use state for the first time.
- KPIs are tracked until the state of the asset changes to Retired or Missing.

Calculation of asset KPIs

The KPIs are calculated based on the tasks associated with the asset and the operational schedule of the asset. The KPI values are stored in the Asset availability [sn_ent_asset_availability] table, which extends the Service Availability table.

Performance tracking for assets that belong to a model category opted in for performance tracking begins when the asset's state changes to In use for the first time. A record is then created in the Asset Availability table with **Asset availability %** set to **100**. The Asset availability % value decreases when the asset experiences an outage.

Outage record creation

An outage record is created in the Outages [cmdb_ci_outage] table when:

- The state of an asset changes from In use to any of the following:
  - In stock - Pending repair
  - In stock - Pending disposal
  - In stock - Defective
- A work order task is created
- An incident is created

The outage record is closed when:

- The status of the asset changes back to In use.
- The work order task is closed.
- The incident is closed.

The duration of the outage is calculated when the repair task is closed.

Classification of outages

- Planned outage: The task type is Planned maintenance or Calibration.
- Unplanned outage: The task type is Break-Fix.

Handling overlapping outages

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Outages can overlap due to multiple events being logged within the same time window. To maintain accurate KPI calculations, overlapping outages are handled with these rules:

1. Overlaps between unplanned outages:
   - When multiple unplanned outages occur during overlapping time periods, they are not treated as separate outages. Instead, they are merged into a single outage to help prevent downtime from being overstated.
   - The total duration of this combined outage is calculated by merging all overlapping time intervals.
   - A sample outage calculation is here:
     a. Outage A: 10:00 AM – 12:00 PM
     b. Outage B: 11:30 AM – 1:00 PM

     Result: The resulting outage window is 10:00 AM – 1:00 PM (a single 3-hour outage).
2. Overlaps between planned and unplanned outages:
   - When a planned outage overlaps with an unplanned outage, the system prioritizes the unplanned outage. The reason is that unplanned failures have a significant impact on asset reliability and performance, and should be fully accounted for in downtime metrics.
   - The overlapping period is classified as an unplanned outage, while any remaining time is classified as a planned outage.
   - A sample outage calculation is here:
     a. Planned outage: 2:00 PM – 4:00 PM
     b. Unplanned outage: 3:00 PM – 5:00 PM
     c. Overlapping period: 3:00 PM – 4:00 PM
     d. Resulting outage window: 2:00 PM – 5:00 PM

     Result:
     - The period from 2:00 PM to 3:00 PM is counted as planned outage time.
     - The period from 3:00 PM to 5:00 PM is counted as unplanned outage time.

Passing on outages through the asset hierarchy

In an asset hierarchy, outage on assets or their child assets are handled as follows:

- If a child asset with the **Required** field set to **true** experiences an outage, its parent asset will also have the outage.
- If a parent asset has an outage, all its child assets will also have the outage.

Asset KPIs

Asset KPI	Formula
Asset availability (in %)	`(Operating hours - Total planned downtime - Total unplanned downtime)/(Operating hours - Total planned downtime)`

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset KPIs (continued)

Asset KPI	Formula
Mean time between failures (MTBF) (in hours)	`(Operating hours - Total planned downtime - Total unplanned downtime)/(Total unplanned outages)`
Mean time to repair (MTTR) (in hours)	`(Total unplanned downtime)/(Total unplanned outages)`

Definition of the variables used in the KPI calculations is as follows:

Variable	Definition
Operating hours	The duration from when the asset first transitioned to the In use state until the current date and time within the asset schedule.
Planned downtime	The duration from when the asset transitioned from the Work in progress state to the Closed complete state for work order tasks of the work types Planned Maintenance or Calibration, within the asset schedule.
Unplanned downtime	The duration from when the asset transitions from the In use state to any repair state, such as In stock - Pending repair, In stock - Pending disposal, or In stock - Defective, until it returns to the In use state, within the asset schedule. If there's no repair state present on the asset through a repair order or other processes, the Work in progress duration of the Breakfix work order task type is used to determine the outage duration. However, if there are overlapping durations between the repair state and the Breakfix work order tasks, the combined duration of both is considered. The asset schedule is also considered when determining the outage duration.
Total unplanned outages	The count of total outage records for an asset excluding planned outages accounting for overlaps. Overlapping and concurrent outages are consolidated as one outage.

Accessing asset KPI reports

- Contextual side bar: You can view the following reports on the contextual side bar:
  - Asset availability and related KPIs report for an individual asset.
  - Asset task time summary report for all enterprise assets.
- Asset performance tab on the Asset analytics view: You can view the average values of the KPIs, including Average availability, Average MTTR, and Average MTBF, for all the assets that are being tracked. Additionally, you can see a list of the assets that contributed to the calculation of these KPIs. For details, see Asset analytics overview for Enterprise Asset workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scheduled job for calculation of asset KPIs

- The *Calculate asset performance KPIs* scheduled weekly job runs every Saturday to calculate the KPIs for the assets that belong to the model categories opted in for performance tracking. These KPIs are then reflected in the Asset availability and related KPIs report, which displays the most recent KPI values.

  Note: To track historical KPIs for existing assets in the opted-in model categories, run the *Calculate availability for historical data* job. This job considers the following tasks associated with an asset to calculate the outages and KPIs:

  - RMA task
  - Work order task
  - Repair task
  - Troubleshoot task
  - Evaluate task
  - Recall task

- The *Asset availability data collection* scheduled weekly job runs every Sunday to calculate the average values of the KPIs that includes Average availability, Average MTTR, and Average MTBF. The job then generates the reports in the Asset performance tab of the Asset analytics view.

Monitor enterprise asset performance with Asset KPIs report

Track the asset availability and related KPI values in the report to see how well an enterprise asset is performing.

Before you begin

Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

About this task

The Asset KPIs report is available for an enterprise asset under the following conditions:

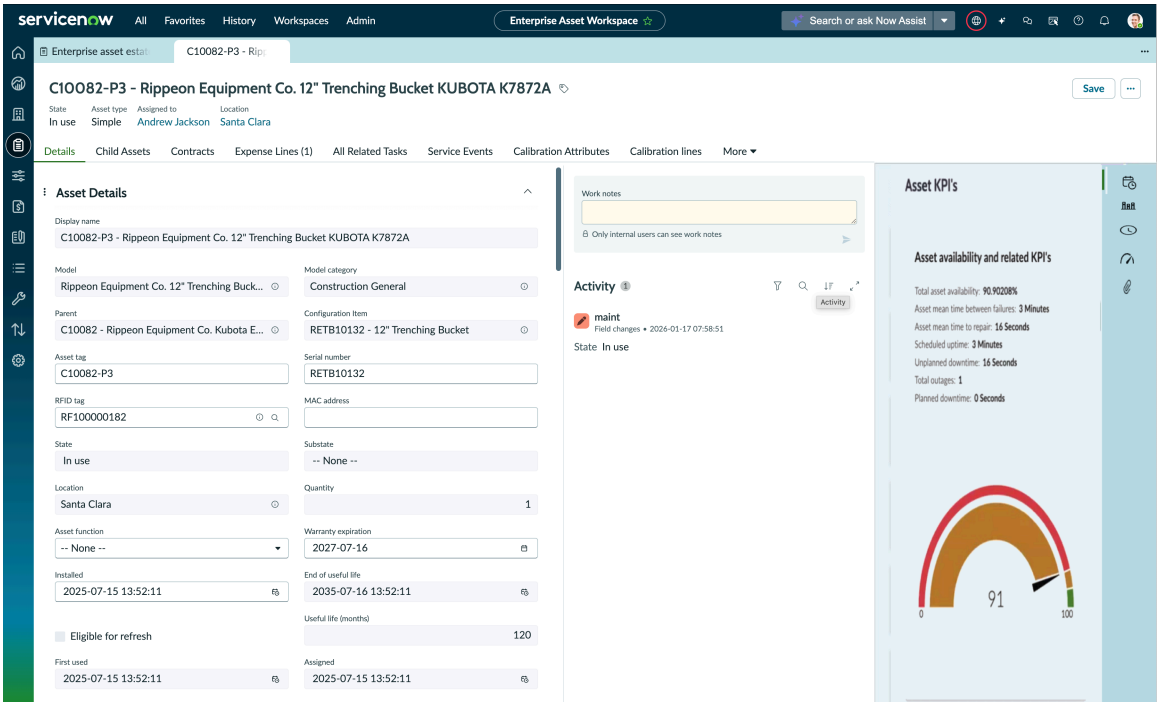
- The asset belongs to a model category for which the performance tracking is enabled. For details, see Opt in to model categories to track performance KPIs for enterprise assets.
- The asset has moved to the In use state, and its KPIs have been calculated and are available in the Asset Availability [sn_ent_asset_availability] table.

  Note: The *Calculate asset performance KPIs* scheduled job runs every week on Saturday to calculate the KPIs for the assets. These KPIs are then reflected in the Asset availability and related KPIs report, which displays the most recent KPI values.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Enterprise asset estate**.
2. Select the **All assets** tab.
3. Select the asset record for which you want to view the details of the asset key performance indicators (KPIs).
4. On the contextual sidebar, select the Asset availability and related KPIs icon [ ].
   The Asset KPIs report is displayed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



5. To view the details of the report, select any section on the report.
   A form view of the availability record for the asset is shown with additional details such as the following:
   - **Current asset schedule**: The asset schedule linked to the asset currently and used for KPI calculations. If no schedule is linked, the Default asset schedule is used.
   - **Start**: The date and time when the asset KPI values were first calculated.
   - **End**: The date and time when the asset KPI values were last calculated.
   - **Outages During Interval** tab: A list of outages with details like start and end time of the outage and the duration of the outage. For more details on outage record creation and handling, see Asset performance reports in the Enterprise Asset Workspace.

Bulk import of your enterprise models and assets

You can use the EAM Bulk Import subflow to import multiple enterprise models and assets into your ServiceNow instance in one go. You can also use this subflow to bulk update existing models and assets.

Bulk import overview

You can bulk import enterprise model and asset data from an external database to your ServiceNow instance. The database must be in the format of a spreadsheet (.xlsx or .xls).

To perform a bulk import, you must create an import record that contains all necessary information and data for the import. You must upload a spreadsheet of your enterprise model and asset data to this record, ensuring that all mandatory fields contain valid values. After all necessary information and data is added to your import record, you can initiate the import.

When you initiate an import, the EAM Bulk Import subflow triggers. This subflow initiates scheduled jobs that copy all spreadsheet data to the appropriate staging tables, validate the data in these tables, and create corresponding records in your target tables.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

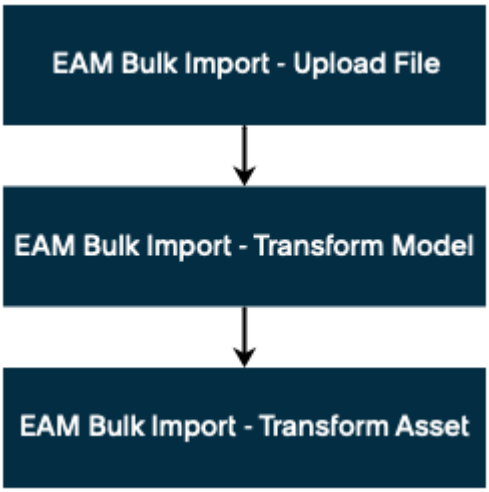
Note: When the OT Asset Management application is activated, you can bulk import hardware assets and models in both the Enterprise Asset Workspace and the OT Asset Workspace only if the OT entity column is marked as **TRUE**.

Import modes

Import modes are the types of imports that you can process. You can choose to import only models, only assets, or both models and assets. You can also choose to create additional models and assets or to update existing models and assets.

Scheduled jobs

The following scheduled jobs execute as part of the EAM Bulk Import subflow.



These scheduled jobs execute based on the import mode that you use.

- The EAM Bulk Import - Upload File scheduled job executes for all import modes.
- The EAM Bulk Import - Transform Model scheduled job executes only when you're creating or updating enterprise models.
- The EAM Bulk Import - Transform Asset scheduled job executes only when you're creating or updating enterprise assets.

For example, if you choose to create both enterprise models and assets, the EAM Bulk Import - Upload file scheduled job uploads the data from the spreadsheet to the three staging tables. Then the EAM Bulk Import - Transform Model scheduled job executes the model and model component transform maps. After the model transform maps are complete, the EAM Bulk Import -Transform Asset scheduled job executes the asset transform map.

Staging tables

The data that you enter in your spreadsheet is copied to one or more of the following staging tables:

- Model Import Staging [sn_eam_model_import_row]
- Model Component Import Staging [sn_eam_mc_import_row]
- Asset Import Staging [sn_eam_asset_import_row]

Importing enterprise models and assets using AI assistance

You can import enterprise models and assets with minimal human intervention by using AI-assisted import.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AI-assisted import simplifies and streamlines the import process by automatically recommending mapping strategies between your external model and asset data and the corresponding Enterprise Asset Management tables and data model components. AI-assisted import can also help you identify import errors automatically.

AI-assisted import stages

The AI-assisted import process consists of the following stages:

1. Import details: Define general details for the import, including the import name and import source file.
2. Column mapping: Define the column mappings that you want to apply to your imports.
3. Value mapping: Define the value mappings that you want to apply to your imports.
4. Review and import: Review and resolve all import data errors and then initiate the import.
5. Summary: Review the summary of your import results.

Throughout the import process, the Enterprise Asset Management application leverages various skills to help you complete each stage.

- During the Column mapping and Value mapping stages, the application leverages the ServiceNow AI Lens skill to generate AI suggestions. You can accept these suggestions, override them manually, or run additional passes to refine them.
- During the Review and import stage, the application leverages the ServiceNow AI Lens skill to automatically identify import data errors. You can review and resolve these errors as needed.
- During the Review and import stage for your enterprise model imports, the application leverages the populate model category skill to populate missing model categories for your enterprise models. The application also leverages the populate classification skill to populate missing classifications for your enterprise models, based on the Enterprise Asset Management data model. For more information on the Enterprise Asset Management data model and model categories, see Enterprise Asset Management data model.

For more information on the ServiceNow AI Lens skill, see ServiceNow AI Lens skill.

Benefits

AI-assisted import can help provide the following benefits:

- Reduces manual effort by handling initial column and value mappings, identifying import data errors, and enabling you to reuse templates from previous imports.
- Improves data consistency by standardizing variations in your table columns and data values. Your data is more reliable for cost tracking, asset life-cycle analysis, and strategic decision-making.

Import enterprise models and assets using AI assistance

Import enterprise models and assets with minimal human intervention by using AI-assisted import.

Before you begin

Important: AI-assisted import supports simple and consumable models and assets only. If you want to import multi-component models and assets, use a manual import instead. For more information on manual imports, see Manually import enterprise models and assets in the Enterprise Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enable and configure AI Search. AI Search is the search engine that enables you to query the Enterprise model classification [sn_ent_model_classification] table when identifying and resolving model classification errors during the AI-assisted import process. For instructions on how to enable and configure AI Search, see Enabling and configuring AI Search in ServiceNow AI Platform® applications.

Role required: You must have either the sn_eam.enterprise_admin role or a combination of the sn_eam.asset_import_users and sn_eam.asset_manager roles.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. From the navigation panel of the Admin center view, navigate to **Bulk import** > **AI assisted import**.
4. Select **New**.
5. On the form, fill in the fields.

> **Note:** At any point while you're defining the AI-assisted import details, you can view general import tips and guidelines by selecting the Show guidelines panel icon on the contextual sidebar.

New AI assisted import form

Field	Description
Import name	Name of the AI-assisted import.
Import config	Configuration that defines how and where your external enterprise model and asset data is imported into your ServiceNow instance. For example, you can define the Enterprise Asset Management tables that your data is added to. The default value is **Models and assets**.
Import source file	Spreadsheet that you want to import external enterprise model and asset data from. You must select and attach a spreadsheet in the .xlsx format.
Sheet name	Worksheet that you want to import external enterprise model and asset data from. This drop-down list automatically populates the name of each worksheet in the spreadsheet that you selected and attached in the **Import source file** field.
Header row	Row number of the column headers in the selected worksheet. For example, if the column headers are in row 3, enter a value of 3.
Copy from template	Import template that you want to populate existing column and value mappings from.

6. Select **Next**.
   The import record is created. All data that you want to import from the source spreadsheet is uploaded into your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If you set the **Import config** field to **Create models** or **Models and assets**, the enterprise model import process begins. You're automatically redirected to the corresponding Column mapping page. Proceed to step 7.
- If you set the **Import config** field to **Create assets**, the enterprise asset import process begins instead. You're automatically redirected to the corresponding Column mapping page. Skip steps 7 to 14 and proceed directly to step 15.

7. Define the column mappings that you want to apply to your imports.
These mappings define the relationships between columns in your source spreadsheet and columns in the corresponding Enterprise Asset Management target tables.

Note: Consider the following points when defining your column mappings:

- If you selected an import template in the **Copy from template** field of the New AI assisted import form, all column mappings from that template are populated automatically. If you did not select an import template, all column mappings are empty by default.
- The column mappings that you define manually take precedence over any mappings that you define autonomously.
- At any point while you're defining your column mappings, you can view detailed tips and guidelines by selecting the Show guidelines panel icon on the contextual sidebar.

a. Define column mappings either autonomously or manually.

Option for defining column mappings	Procedure
Define column mappings autonomously	Select **Auto map** in the Target fields list header. The auto-map runs, triggering the ServiceNow AI Lens skill. This skill analyzes the columns in your source spreadsheet and suggests mappings to columns in the corresponding Enterprise Asset Management target tables. Each suggestion is populated in the Target fields list and includes a confidence score from 0% to 100%. Higher scores indicate stronger matches. **Note:** If you define any column mappings manually before running the auto-map, the ServiceNow AI Lens skill does not automatically override them with any AI-generated suggestions. You can replace an existing mapping with an AI-generated suggestion by manually removing the mapping before running the auto-map. If you run the auto-map multiple times, the ServiceNow AI Lens skill automatically overrides all previous AI-generated suggestions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option for defining column mappings	Procedure
Define column mappings manually	i. In the Target fields and Source fields lists, locate the target and source columns that you want to map to each other. **Note:** You can map multiple source columns to a single target column. You can also map a single source column to multiple target columns. ii. Drag the source column from the Source fields list onto the **Source** field of the target column in the Target fields list. Alternatively, select **+ Add** in the **Source** field to search for and select the source column that you want to map to the given target column. The confidence score for the mapping is automatically set to 100%. iii. Repeat step b for each source column that you want to map to the target column. iv. Repeat steps a to c for each column mapping that you want to define. **Important:** You must define the mapping for each target column that is marked as required. All other column mappings are optional.

b. Review your column mappings to verify that they are accurate.
Adjust any mappings as needed.

Note: If you want to remove any mappings, use the following options:

- To remove the mapping between a target column and a specific source column, select the **X** next to the source column name in the **Source** field.
- To remove all mappings between a target column and its source columns, select the **X** in the **Source** field.
- To remove all column mappings, select **Clear all** in the Target fields list header.

c. Select **Save**.

d. Select **Confirm column mappings**.
The column mappings are confirmed and you're automatically redirected to the Value mapping page.

Note: The Value mapping page is accessible only after you have confirmed your column mappings.

8. Define the value mappings that you want to apply to your imports.
Source and target columns can contain choice lists and reference fields. When you map a source column to a target column, you can also map each choice list or reference field value that is supported by the source column to a matching value that is supported by the target column.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Consider the following points when defining your value mappings:

- You can define value mappings only for the column mappings that you defined and confirmed in step 7.
- You can define mappings for reference field values only if the original reference field tables are already populated with the relevant data.
- If you selected an import template in the **Copy from template** field of the New AI assisted import form, all value mappings from that template are populated automatically. If you did not select an import template, all value mappings are empty by default.
- The value mappings that you define manually take precedence over any mappings that you define autonomously.
- At any point while you're defining your value mappings, you can view detailed tips and guidelines by selecting the Show guidelines panel icon on the contextual sidebar.

a. Define value mappings either autonomously or manually.

Note: If you don't want to define any value mappings, skip steps a to c and then proceed directly to step d.

If you don't define some or any value mappings, the original values from your source spreadsheet are uploaded as-is. You must then resolve those values during the Review and import stage before you can import them.

Option for defining value mappings	Procedure
Autonomously define value mappings for all available column mappings	Select **Auto map all** in the Value mapping list header. The auto-map runs, triggering the ServiceNow AI Lens skill. This skill analyzes the choice list and reference field values in your source spreadsheet and suggests mappings to values in the corresponding Enterprise Asset Management target tables. Each suggestion includes a confidence score from 0% to 100%. Higher scores indicate stronger matches. **Note:** If you define any value mappings manually before running the auto-map, the ServiceNow AI Lens skill does not automatically override them with any AI-generated suggestions. You can replace an existing mapping with an AI-generated suggestion by manually removing the mapping before running the auto-map. If you run the auto-map multiple times, the ServiceNow AI Lens skill automatically overrides all previous AI-generated suggestions.
Autonomously define value mappings for a specific column mapping	**i.** In the Value mapping list, locate the column mapping that you want to define value mappings for. **ii.** Select **Auto map** next to the column mapping.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option for defining value mappings	Procedure
	The auto-map runs, triggering the ServiceNow AI Lens skill. This skill analyzes the choice list and reference field values in your source spreadsheet and suggests mappings to values in the corresponding Enterprise Asset Management target tables. Each suggestion includes a confidence score from 0% to 100%. Higher scores indicate stronger matches. **Note:** If you define any value mappings manually before running the auto-map, the ServiceNow AI Lens skill does not automatically override them with any AI-generated suggestions. You can replace an existing mapping with an AI-generated suggestion by manually removing the mapping before running the auto-map. If you run the auto-map multiple times, the ServiceNow AI Lens skill automatically overrides all previous AI-generated suggestions.
Define value mappings manually	**i.** In the Value mapping list, expand the column mapping that you want to define value mappings for. **ii.** Locate the source column value that you want to map a target column value to. **iii.** In the corresponding drop-down list, select a matching target column value. The confidence score for the mapping is automatically set to 100%. **iv.** Repeat steps b and c for each value mapping that you want to define.

b. Review your value mappings to verify that they are accurate.
Adjust any mappings as needed.

Note: If you want to remove any mappings, use the following options:

- To remove all value mappings for a specific column mapping, select **Clear** next to the column mapping.
- To remove all value mappings for all available column mappings, select **Clear all** in the Value mapping list header.

c. Select **Save**.

d. Select **Confirm value mappings**.
The value mappings are confirmed. The Enterprise Asset Management application uploads data from your source spreadsheet to the corresponding staging tables and then begins preparing the data for review. The Preparing your data for review dialog box opens, displaying status updates as the data preparation progresses.

Note: Processing time varies based on the amount of data that the Enterprise Asset Management application must prepare. Larger amounts of data require longer processing times.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. After all import data is prepared for review, select **Refresh** in the dialog box.
You're automatically redirected to the Review and import page.

> **Note:** The Review and import page is accessible only after you have confirmed your value mappings and prepared all import data for review.

9. Review your import data and resolve any resulting errors.

Before you initiate the import, you can review the data that was uploaded from your source spreadsheet.

The Enterprise Asset Management application also reviews this data to help identify errors, such as missing field values and unmatched references. If you defined column and value mappings for the import, the application reviews the data and identifies errors based on these mappings. If you didn't define some or any mappings, the application reviews the corresponding data as-is and identifies errors accordingly. You can review and resolve these errors as needed.

> **Note:** At any point while you're reviewing your import data or resolving your errors, you can view detailed tips and guidelines by selecting the Show guidelines panel icon on the contextual sidebar.

a. Review all import data by selecting **All Models** on the Review and Import page.
The Total rows list opens, displaying all enterprise model data that was uploaded from your source spreadsheet.

b. Review and resolve your import data errors.

i. Review your import data errors through either the Total rows list or the Errors list.

- Total rows list: Displays all enterprise model data that was uploaded from your source spreadsheet, regardless of whether the enterprise models have any errors or not.

  You can open this list by selecting **All Models** on the Review and Import page.

- Errors list: Displays data for only the enterprise models that have errors.

  You can open this list by selecting **Errors** on the Review and Import page.

Each error is highlighted in the Total rows and Errors lists. You can filter each list by error type by selecting the Filter by error group icon on the corresponding list header.

Depending on the format that you want to view your data in, you can also toggle between the following list views:

- Original: Displays only string values for your enterprise model data. If you defined any value mappings, this list view displays all mapped values as strings. If you didn't define some or any value mappings, this list view displays the original string values from the source spreadsheet.

  You can toggle to this list view by selecting **Original** on the Total rows or Errors list header.

- Resolved: Displays choice, reference, or string values for your enterprise model data.
  - If a choice or reference value is populated in the Original list view, the Resolved list view displays the resolved choice or reference (sys_id) value. For example, the **Resolved manufacturer** column stores references from the target Companies

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

[core_company] table. These references match the values displayed in the Original list view.

- If a choice or reference value isn't populated in the Original list view, and there are no matching references in the target table, the corresponding fields in the Resolved list view remain empty. You must select the appropriate choice or reference field values manually.
- If any string values in your source spreadsheet correspond directly with string fields in a target table, this list view displays the original string values. For example, the **Model name** column displays the original model name string values from your source spreadsheet.

You can toggle to this list view by selecting **Resolved** on the Total rows or Errors list header.

Note: If the status of an enterprise model is unmapped or empty, the Enterprise Asset Management application automatically sets it to the default value of In production.

ii. Automatically resolve errors for missing model categories and classifications.

- To resolve errors for missing model categories, select **Populate model category** in the Total rows or Errors list header.

  This option triggers the populate model category skill, which automatically populates missing model categories for your enterprise models.

  Note: You can populate missing model categories only for the enterprise models that you have uploaded the following data for:

  - Manufacturer
  - Model name or number

- To resolve errors for missing model classifications, select **Populate classification** in the Total rows or Errors list header. When the Select source for classification dialog box opens, search for and select a source to populate classifications from.

  This option triggers the populate classification skill, which automatically populates missing classifications for your enterprise models, based on the Enterprise Asset Management data model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The populate classification skill uses AI Search to query the Enterprise model classification [sn_ent_model_classification] table when populating missing model classifications. This table stores all available model classifications and their corresponding classification codes. Before AI Search can perform the query, it must index the table to make the data searchable. In most cases, AI Search indexes the table automatically. However, manual indexing is required under the following scenarios:

- The table has never been indexed.

  This scenario can occur due to AI Search configuration issues or ServiceNow AI Platform issues. It can also occur if you enable and configure AI Search after installing the Enterprise Asset Management application.

- You insert a table record that uses a script with the `setWorkFlow()` method set to `false`.
- You import or side-load data from an XML file into the table.

For instructions on how to index a table manually, Perform a full table index or reindex for a single AI Search indexed source.

Note: You can populate missing classifications only for the enterprise models that you have uploaded the following data for:

- Manufacturer
- Model name or number
- Model category

iii. Resolve all other errors manually by using either of the following options:

- To resolve your errors directly within the Total rows or Errors list, use the following steps:
  1. Double-click a field value that you must update.

     These field values are highlighted in the list.
  2. When prompted, update the field value as needed.
  3. Select **Apply**.
  4. Repeat steps a to c for each field value that you must update.
- To resolve your errors through the Edit model record window, use the following steps:
  1. Select the Edit icon next to the error that you want to resolve.

     The Edit model record window opens, indicating which field values you must update to resolve the error.
  2. Update the field values as needed.
  3. Select **Update**.
  4. Repeat steps a to c for each error that you want to resolve.

iv. Refresh the list of errors by selecting **Revalidate** in the Total rows or Errors list header.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

By refreshing the list, you can determine which errors you resolved successfully and which errors you must still resolve.

> **Note:** You're not required to resolve all errors before initiating the import. If you're unable to resolve an error, the corresponding enterprise model is excluded from the import. Only enterprise models without any errors are included.

10. When you're ready to import your data, select **Initiate Import**.
11. In the Confirm import dialog box, select **Confirm**.
    The import begins, initiating scheduled jobs to upload the data from your staging tables to the corresponding target tables. The Import in progress dialog box also opens, displaying status updates as the import progresses.

    > **Note:** Processing time varies based on the amount of data that you're importing. Larger amounts of data require longer processing times.

12. After the import is complete, select **Refresh** in the dialog box.
    You're automatically redirected to the Summary page.
13. Review your import results.
    The Summary page contains various widgets that provide details about your enterprise model imports. Select any widget to view additional details.

    > **Note:** At any point while you're reviewing your import results, you can view detailed tips and guidelines by selecting the Show guidelines panel icon on the contextual sidebar.

    Summary page widgets for enterprise model imports

Widget	Description
Models rows	Enterprise models that appear in the source spreadsheet.
Models inserts	Unique enterprise models that were imported into your ServiceNow instance.
Models not imported	Enterprise models that were not imported into your ServiceNow instance.

    > **Note:** If you set the **Import config** field in the New AI assisted import form to **Create models**, skip steps 14 to 19 and proceed directly to step 20.

14. Select **Next**.
    The enterprise model import process is completed and then the enterprise asset import process begins. You're automatically redirected to the corresponding Column mapping page.
15. Repeat step 7 to define column mappings for your enterprise asset imports.

    > **Note:**
    >
    > - If you set the **Import config** field in the New AI assisted import form to **Create assets**, the **Model** column appears in the Target fields list. You can then define the column mapping to associate your enterprise assets with existing enterprise models.
    > - If you set the **Import config** field to **Models and assets**, the **Model** column doesn't appear in the Target fields list. In this scenario, enterprise models are also created during the import, so the Enterprise Asset Management application automatically associates each enterprise asset with a model that you have imported.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

16. Repeat step 8 to define value mappings for your enterprise asset imports.
17. Review your import data and resolve any resulting errors.

    Before you initiate the import, you can review the data that was uploaded from your source spreadsheet.

    The Enterprise Asset Management application also reviews this data to help identify errors, such as missing field values and unmatched references. If you defined column and value mappings for the import, the application reviews the data and identifies errors based on these mappings. If you didn't define some or any mappings, the application reviews the corresponding data as-is and identifies errors accordingly. You can review and resolve these errors as needed.

    Note: At any point while you're reviewing your import data or resolving your errors, you can view detailed tips and guidelines by selecting the Show guidelines panel icon on the contextual sidebar.

    a. Review all import data by selecting **All Assets** on the Review and Import page.
    The Total rows list opens, displaying all enterprise asset data that was uploaded from your source spreadsheet.

    b. Review and resolve your import data errors.

        i. Review your import data errors through either the Total rows list or the Errors list.

        - Total rows list: Displays all enterprise asset data that was uploaded from your source spreadsheet, regardless of whether the enterprise assets have any errors or not.

          Open this list by selecting **All Assets** on the Review and Import page.

        - Errors list: Displays data for only the enterprise assets that have errors.

          Open this list by selecting **Errors** on the Review and Import page.

        Each error is highlighted in the Total rows and Errors lists. You can filter each list by error type by selecting the Filter by error group icon on the corresponding list header.

        Depending on the format that you want to view your data in, you can also toggle between the following list views:

        - Original: Displays only string values for your enterprise asset data. If you defined any value mappings, this list view displays all mapped values as strings. If you didn't define some or any value mappings, this list view displays the original string values from the source spreadsheet.

          You can toggle to this list view by selecting **Original** on the Total rows or Errors list header.

        - Resolved: Displays choice, reference, or string values for your enterprise asset data.
            - If a choice or reference value is populated in the Original list view, the Resolved list view displays the resolved choice or reference (sys_id) value. For example, the **Resolved location** column stores references from the target Locations [cmn_location] table. These references match the values displayed in the Original list view.
            - If a choice or reference value isn't populated in the Original list view, and there are no matching references in the target table, the corresponding fields in the Resolved list view remain empty. You must select the appropriate choice or reference field values manually.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If any string values in your source spreadsheet correspond directly with string fields in a target table, this list view displays the original string values. For example, the **Serial number** column displays the original serial number string values from your source spreadsheet.

You can toggle to this list view by selecting **Resolved** on the Total rows or Errors list header.

Note: If the state and substate of an enterprise asset are unmapped or empty, the Enterprise Asset Management application automatically sets them to the following default values, based on whether the asset contains a mapped location or stockroom value:

- If the asset contains a mapped location value, the state is set to the default value of **In use**.
- If the asset contains a mapped stockroom value, the state and substate are set to the default values of **In stock** and **Available**.
- If the asset contains both a mapped location and stockroom value, the stockroom value takes precedence over the location value. The state and substate are set to the default values of **In stock** and **Available**.

If an enterprise asset already has a state and substate, the existing values remain unchanged.

ii. Resolve your errors using either of the following options:

- To resolve your errors directly within the Total rows or Errors list, use the following steps:
  1. Double-click a field value that you must update.

     These field values are highlighted in the list.
  2. When prompted, update the field value as needed.
  3. Select **Apply**.
  4. Repeat steps a to c for each field value that you must update.
- To resolve your errors through the Edit asset record window, use the following steps:
  1. Select the Edit icon next to the error that you want to resolve.

     The Edit asset record window opens, indicating which field values you must update to resolve the error.
  2. Update the field values as needed.
  3. Select **Update**.
  4. Repeat steps a to c for each error that you want to resolve.

iii. Refresh the list of errors by selecting **Revalidate** in the Total rows or Errors list header.

By refreshing the list, you can determine which errors you resolved successfully and which errors you must still resolve.

Note: You're not required to resolve all errors before initiating the import. If you're unable to resolve an error, the corresponding enterprise asset is excluded from the import. Only enterprise assets without any errors are included.

18. Repeat steps 10 to 12 to initiate and complete the import.
19. Review your import results.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Summary page contains various widgets that provide details about your enterprise asset imports. You can select any widget to view additional details.

Note: At any point while you're reviewing your import results, you can view detailed tips and guidelines by selecting the Show guidelines panel icon on the contextual sidebar.

Summary page widgets for enterprise asset imports

Widget	Description
Assets rows	Enterprise assets that appear in the source spreadsheet.
Assets inserts	Unique enterprise assets that were imported into your ServiceNow instance.
Assets not imported	Enterprise assets that were not imported into your ServiceNow instance.

20. If you want to reuse your column and value mappings for future imports, select **Save as template** to save the completed import record as a template.
When you create additional import records in the future, this template is available to select from in the **Copy from template** field of the New AI assisted import form.

Result
Your enterprise models and assets are imported into your ServiceNow instance. They appear in the corresponding target tables in the Enterprise Asset Workspace.

Manually import enterprise models and assets in the Enterprise Asset Workspace

Manually import multiple enterprise models and assets in one go in the Enterprise Asset Workspace.

Before you begin
Download and update the appropriate template for your import. This template, which is a spreadsheet in the .xlsx or .xls format, must contain all external enterprise model and asset data that you want to import. For detailed instructions, see Download seeded templates for manual bulk imports.

Role required: sn_eam.enterprise_admin

About this task
You can import enterprise models and assets of different types such as simple, pre-assembled, user-assembled assets, and consumables. You can also view the import errors and status.

The enterprise models and asset import records are stored in the Enterprise Bulk Import [sn_eam_bulk_import] table.

The Flow Designer application is used to initiate the EAM Bulk Import subflow to assist you in importing enterprise models and assets. As the flow takes you through the various stages, the import details are automatically updated. You can open the EAM Bulk Import flow to view the status of the stages in the flow.

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.
3. In the navigation panel of the Admin center view, select **Bulk import** > **Manual import**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Depending on the type of import that you want to perform, select one of the following manual import options:
   - **Create models and assets**: Manually import new enterprise models and assets.
   - **Create models**: Manually import new enterprise models.
   - **Create assets**: Manually import new enterprise assets.
   - **Update models and assets**: Manually import existing enterprise models and assets that have been updated.
   - **Update models**: Manually import existing enterprise models that have been updated.
   - **Update assets**: Manually import existing enterprise assets that have been updated.
5. On the corresponding import page, select **New**.
   The Create New Enterprise Bulk Import page opens.

   Note: At any point during the bulk import process, you can view detailed import guidelines by selecting the Bulk import job instructions icon on the contextual side bar of the Create New Enterprise Bulk Import page.

6. Enter a unique name for the import process in the **Name** field.
7. Select a mode for the import in the **Mode** field.
8. Select **Attach File** to upload the spreadsheet (.xlsx or .xls) that contains your enterprise model or asset data.
9. Select **Import** to perform a validation check on the spreadsheet.
   After you select Import, the Status field changes from **Draft** and moves to **Pending**, **Uploading**, **Transforming**. After the import process is completed, the status changes to either **Completed**, **Completed with errors**, or **Failed**. You can view details regarding the result of the import process for models and assets in the **Model import result** and **Asset import result** sections.
10. Select **Model Import staging**, **Model component Import staging**, or **Asset Import Staging** related lists to view the details of the spreadsheet that you uploaded and also view any errors you received.
11. Open any record for which you got an error.
12. Fix the error, upload the spreadsheet, and import the record again.

Download seeded templates for manual bulk imports

Download seeded templates that you can use for your manual enterprise model and asset imports. You can use the templates as is or modify them based on your organization's needs.

Before you begin
Role required: sn_eam.enterprise_admin

About this task
Seeded templates are pre-configured for specific import scenarios. They also include a detailed implementation aid that provides comprehensive guidance on the fields and formatting that are required for each import. You can use these templates to import enterprise models only, enterprise assets only, or a combination of both enterprise models and assets.

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Admin center view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. In the navigation panel of the Admin center view, select **Bulk import** > **Manual import** > **Seeded template**.
4. From the list of available templates, select the seeded template that you want to download.
   - **Seeded Template - Asset Import only**: Template for importing enterprise assets only. Select this option if you want to create or update enterprise assets.
   - **Seeded Template - Model and Asset Import**: Template for importing both enterprise models and assets. Select this option if you want to create or update both enterprise models and assets.
   - **Seeded Template - Model Import only**: Template for importing enterprise models only. Select this option if you want to create or update enterprise models.
5. On the contextual side panel of the template record, select the Attachment icon .
6. In the Attachments window, select the Actions icon next to the template name.
7. From the list of available actions, select **Download**.
   The template downloads as a spreadsheet in the .xlsx format.
8. **Optional:** Modify the downloaded template based on your organization's needs.
   If your organization has specific import requirements, you can modify the template and upload it for later use. Users across your organization can then download and use the modified template for future imports.

   a. Open the downloaded template in Microsoft Excel.

   b. Make any of the following modifications to the template:
   - Remove the columns for any optional fields that aren't necessary for your imports.

     Important: Do not remove the columns for any mandatory fields.

   - Rearrange the column order to match the structure of your source data.

     Important: Do not change the names of any column headers.

   c. Save the modified template.

   d. Return to your ServiceNow instance and then reopen the template record.

   e. In the Attachments window of the template record, select the Add file icon to search for and select the modified template that you want to upload.
   The modified template is uploaded to your ServiceNow instance. It is then available to download and use for future imports.

What to do next

Enter all enterprise model or asset details in the spreadsheet.

Note: You must enter values in all mandatory fields of the spreadsheet. If you leave any mandatory fields empty, the import fails. An error message then appears, asking you to check the template format. For the complete list of mandatory fields, see Mandatory fields in the bulk import spreadsheets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The following optional fields accept only user ID values:

- **Assigned to**
- **Managed by**
- **Reserved for**
- **Owned by**
- **Supported by**

Note: The optional **Location full name** field helps verify that assets are linked to the correct location. If you provide values for both the **Location full name** and **Location** fields, and the two values don't match, an error message appears and the import for that specific asset is not processed. Similarly, if the specified location can't be found or if multiple locations are found with the same name, an error message appears and the import for that specific asset is also not processed.

Create a multi-asset onboarding process

Onboard multiple assets at one go by creating a multi-asset onboarding playbook.

Before you begin

Role required: sn_eam.enterprise_asset_manager

About this task

An enterprise asset technician submits an onboarding order. As an enterprise asset manager, you can work on the Multi-asset onboarding task associated with the onboarding order using the Onboarding playbook.

You can perform inline editing directly in the playbook. This capability enables you to change a value in a record directly instead of opening the record and updating the values on the form.

To close an onboarding task, you should either complete or skip all the activities in the playbook.

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Asset operations**.
2. From the **Onboarding** list, select **Onboarding tasks**.
3. Select the onboarding task record for which you want to create a multi-asset onboarding process.
4. Select the **Onboarding playbook** tab.
   The Muti-asset onboarding playbook is displayed.
5. Review or enter details in the **Review model details** lane.
6. Select **Mark as complete** to proceed to the next lane.
   After you complete entering details in the Review model lane, all other review assets activities are unlocked.
7. Continue to review or enter details in all the lanes until you reach the last lane (Deployment).
8. Review and then complete or skip the **Deployment** activity.
   - Create a deploy task.
     a. In the **Location** field, select the location where you want to deploy the asset.

        Note: This field is required to deploy the asset.

     b. In the **Assigned to** field, select the person to whom the asset should be assigned.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

> **Note:** By default, this field is auto-populated with the value that you selected in the **Reserved for** field when you performed the **Review assets assignment** activity.

c. In the **Create deploy task** field, select **true**.

d. Select **Mark as complete**.

Based on the value of the *com.sn_eam.default_deployment_task* asset property set by your enterprise administrator, either of the following deploy tasks are created:

- If the value is set to **sn_eam_deploy_asset_task**, an Enterprise Deploy Asset task is created for each asset that should be deployed. The deploy tasks are listed in the **Deploy Asset task** tab.
- If the value is set to **wm_task**, a Work order task is created for each asset that should be deployed. The deploy tasks are listed in the **Work Order Task** tab.

In the deploy task that's created, the **Assignment group** and the **Assigned to** fields are auto-populated with the values that you selected in the **Support group** and **Supported by** fields when you performed the **Review assets management** activity.

> **Note:** You can assign a work order task only to the Enterprise Field Technicians support group.

- Skip the Deployment activity by selecting **Skip**.

The asset technicians complete the deploy tasks assigned to them. For more information, see Complete and close the Pick Up task for an enterprise asset and Complete and close a work order for an enterprise asset.

9. After all the lanes show a status of skipped or complete, select **Close Task** to complete the multi-asset onboarding process.
   Your assets are successfully onboarded. The onboarding task is completed and the request and requested item's state changes to **Closed Complete**.

Managing enterprise asset move orders

You can use move orders to move in-use or consumed enterprise assets from one location to another.

When you submit a move order, the Enterprise Asset Management application automatically generates an enterprise move line record for each enterprise asset that you include in the order. These records enable you to individually track and manage the movement of each enterprise asset in your move order.

For each enterprise move line record within a move order, you must indicate how you are going to move the given enterprise asset. You can choose to ship the enterprise asset through a third-party shipping carrier or move the enterprise asset locally without shipping it. Based on the option that you choose, you must complete all subsequent tasks to move the enterprise asset and update the enterprise move line record with a status of Completed. After every enterprise move line record within a move order reaches a status of Completed, the move order is marked as complete.

Submitting an enterprise asset move order

You can submit an enterprise asset move order through either the ServiceNow® Service Catalog or the Inventory view of the Enterprise Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Submit an enterprise asset move order through the Service Catalog

Use the ServiceNow® Service Catalog to submit a move order so that you can move in-use or consumed enterprise assets between locations.

Before you begin

Role required: sn_eam.enterprise_asset_manager or end user

Note: The sn_eam.enterprise_asset_manager role can submit move orders for any enterprise assets within a deployment. The end user role can submit move orders for only assigned enterprise assets.

Procedure

1. Navigate to **All** > **Service Catalog** > **Enterprise Asset Lifecycle**.
2. From the list of available Enterprise Asset Lifecycle catalog items, select **Asset Move Order**.
3. On the Catalog item to initiate an asset move order form, fill in the fields.

Catalog item to initiate an asset move order form

Field	Description
Requested for	User who the move order is being submitted for. If you specify a user in this field, the move order can include enterprise assets that are assigned only to that user.
Assignment group	Group that you want to assign the move order to.
Assigned to	User who you want to assign the move order to.
Move date	Date on which you want to move the enterprise assets.
From location	Location that you want to move the enterprise assets from.
To location	Location that you want to move the enterprise assets to.
Asset(s)	Enterprise assets that you want to include in the move order. You can select from any of the enterprise assets that reside in the location specified in the **From location** field. **Note:** If you select an enterprise asset that contains any child assets, all child assets are also included in the move order.
Notes/ Special Instructions	Additional notes or instructions for the move order.

4. Select **Submit**.

Submit an enterprise asset move order through the Asset operations view

Use the Asset operations view of the Enterprise Asset Workspace to submit a move order so that you can move in-use or consumed enterprise assets between locations.

Before you begin

Role required: sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From the Enterprise Asset Workspace, navigate to **Asset operations** > **Moves** > **Move orders**.
2. Select **New**.
3. On the Create new move order form, fill in the fields.

Create new move order form

Field	Description
Requested for	User who the move order is being submitted for. If you specify a user in this field, the move order can include enterprise assets that are assigned only to that user.
Move date	Date on which you want to move the enterprise assets.
Assignment group	Group that you want to assign the move order to.
Assigned to	User who you want to assign the move order to.
From location	Location that you want to move the enterprise assets from.
To location	Location that you want to move the enterprise assets to.
Additional information	Additional information about the move order.

4. Select **Save**.
   The form closes and you are automatically redirected to the new move order record.

What to do next

Add enterprise assets to the move order. See Add enterprise assets to a move order for detailed instructions.

Add enterprise assets to a move order

Add the enterprise assets that you want to include in a move order.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, navigate to **Asset operations** > **Moves** > **Move orders**.
2. From the list of available move orders, select the move order that you want to add enterprise assets to.
   The move order record opens.
3. On the move order record, select the **Enterprise move lines** tab.
4. Select **Add**.
   The Add assets dialog box opens.
5. In the dialog box, select the check box for every enterprise asset that you want to include in the move order.

   You can select from any of the enterprise assets that reside in the location specified in the **From location** field of the move order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If you select an enterprise asset that contains any child assets, all child assets are also included in the move order.

6. Select **Add**.

Result
The selected enterprise assets are added to the move order.

Remove enterprise assets from a move order

Remove any enterprise assets that you no longer want to include in a move order.

Before you begin
Role required: sn_eam.enterprise_asset_manager

Procedure
1. From the Enterprise Asset Workspace, navigate to **Asset operations** > **Moves** > **Move orders**.
2. From the list of available move orders, select the move order that you want to remove enterprise assets from.
   The move order record opens.
3. On the move order record, select the **Enterprise move lines** tab.
4. From the list of enterprise move lines, select the check box for every enterprise asset that you want to remove.

   Note: Each enterprise move line corresponds with a specific enterprise asset.

   Note: If you select an enterprise asset that contains any child assets, all child assets are also removed from the move order.

5. Select **Remove**.

Result
The selected enterprise assets are automatically updated with a status of Cancelled. All enterprise move tasks that are associated with the corresponding enterprise move lines are also updated with a state of Closed Incomplete.

Completing an enterprise asset move order

After you submit a move order for the in-use or consumed enterprise assets that you want to move, you must perform various tasks to complete the order.

You must complete the required set of tasks for each enterprise asset that is included in the move order. After you complete all required tasks for an enterprise asset, the corresponding enterprise move line updates with a status of Completed. Once all enterprise move lines reach a status of Completed, the move order is complete.

Complete the Prepare task for a moving enterprise asset

Complete the Prepare task for an enterprise asset so that you can proceed with moving the asset between locations.

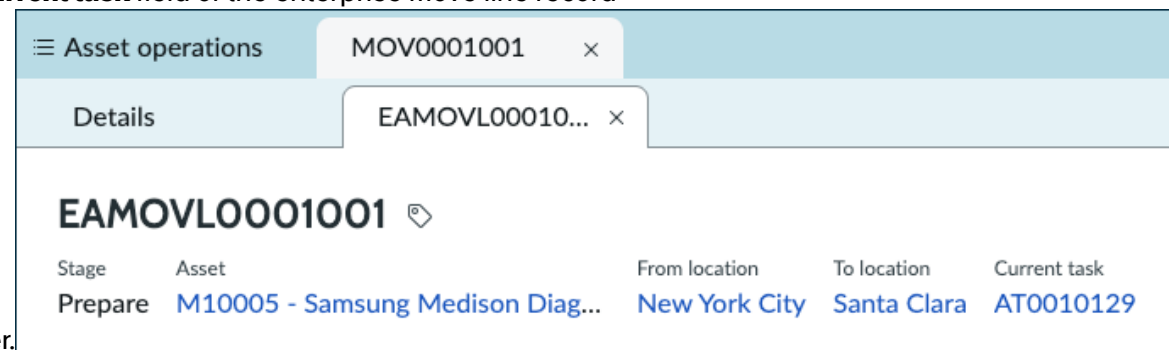
Before you begin
Role required: sn_eam.enterprise_asset_manager, sn_eam.enterprise_admin, or enterprise_asset_technician

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From the Enterprise Asset Workspace, navigate to **Asset operations** > **Moves** > **Move orders**.
2. From the list of available move orders, select the move order that you want to complete.
   The move order record opens.
3. On the move order record, select the **Enterprise move lines** tab.
4. From the list of available enterprise move lines, select the enterprise move line for the enterprise asset that you want to move.
   The enterprise move line record opens.
5. On the **Enterprise move tasks** tab, select the task number for the **Prepare** task.

   Alternatively, select the task number that is displayed in the **Current task** field of the enterprise move line record header.



   The Prepare task opens.
6. On the **Details** tab of the Prepare task, fill in the fields.

Details tab

Field	Description
Enterprise move task	
Assignment group	Group that the task is assigned to. This field populates automatically based on the group that the entire move order is assigned to.
Assigned to	User who the task is assigned to. This field populates automatically based on the user who the entire move order is assigned to.
Scheduled date	Date and time at which the task is scheduled to be completed.
Priority	Priority of the task.
Move type	Type of enterprise asset move. Select one of the following options: ○ **Local Move**: Option to move the enterprise asset to a different location without shipping it. ○ **Ship**: Option to ship the enterprise asset to a different location.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Work notes	Notes about the task that are visible to all users within your organization.

7. Select **Close Task**.

Result
The Prepare task is automatically updated with a state of Closed Complete.

If you set the **Move type** field to **Local Move**, the Enterprise Asset Management application automatically generates a corresponding Local move task for the enterprise move line. If you set the **Move type** field to **Ship**, the Enterprise Asset Management application automatically generates a corresponding Ship task for the enterprise move line.

What to do next
If you set the **Move type** field to **Local Move**, proceed to Complete the local move for an enterprise asset to complete the move.

If you set the **Move type** field to **Ship**, proceed to Complete the shipment for a moving enterprise asset to complete the shipment.

Complete the local move for an enterprise asset

Perform all tasks that are required to move an enterprise asset without shipping it. You must perform these tasks if you set the **Move type** field to **Local Move** in an enterprise move line.

Before you begin
Before you can proceed with the local move, you must complete the Prepare task for the enterprise asset. See Complete the Prepare task for a moving enterprise asset for detailed instructions.

Role required: sn_eam.enterprise_asset_manager, sn_eam.enterprise_admin, or enterprise_asset_technician

Procedure
1. From the Enterprise Asset Workspace, navigate to **Asset operations** > **Moves** > **Move orders**.
2. From the list of available move orders, select the move order that you want to complete.
   The move order record opens.
3. On the move order record, select the **Enterprise move lines** tab.
4. From the list of available enterprise move lines, select the enterprise move line for the enterprise asset that you want to move.
   The enterprise move line record opens.
5. Complete and close the Local move task for the enterprise move line.

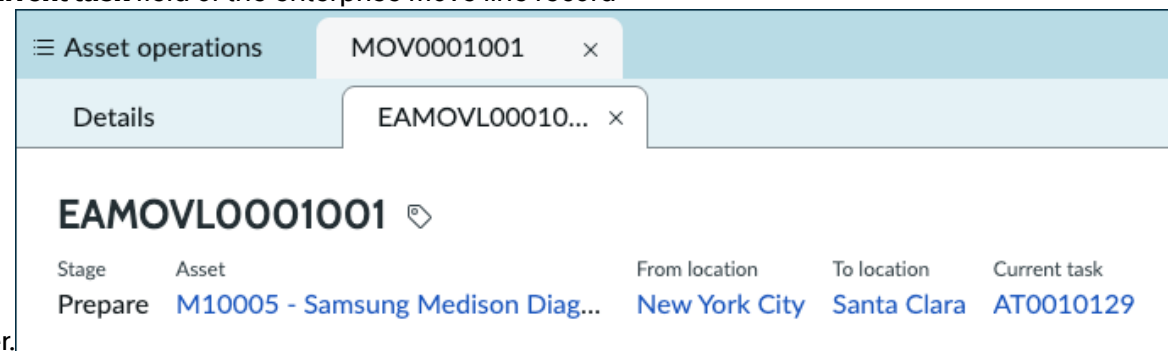
   By default, this Local move task applies only to the enterprise asset that is associated with the given enterprise move line. If you want to apply the same Local move task to additional enterprise assets within your move order, you can include those assets in the task.

   To successfully complete and close this task, the enterprise asset must be moved to the target location without being shipped.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the **Enterprise move tasks** tab, select the task number for the **Local move** task.

Alternatively, select the task number that is displayed in the **Current task** field of the enterprise move line record header.



The Local move task opens.

b. On the **Details** tab of the Local move task, fill in the fields.

Details tab

Field	Description
Enterprise move task	
Assignment group	Group that the task is assigned to. This field populates automatically based on the group that the entire move order is assigned to.
Assigned to	User who the task is assigned to. This field populates automatically based on the user who the entire move order is assigned to.
Scheduled date	Date and time at which the task is scheduled to be completed.
Priority	Priority of the task.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Close the task.

- To close the task without including additional enterprise assets from your move order, select **Close Task**.
- To close the task after including additional enterprise assets from your move order, use the following steps:

  i. Select **Include more assets**.

  The Select assets dialog box opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

ii. In the dialog box, select the check box for each additional enterprise asset that you want to include.

iii. Select **Close Task**.

The Local move task is automatically updated with a state of Closed Complete.

Result
The enterprise move line is automatically updated with a status of Completed.

What to do next
Move all remaining enterprise assets that are included in the move order. After all corresponding enterprise move lines reach a status of Completed, the move order is complete.

Complete the shipment for a moving enterprise asset

Perform all tasks that are required to ship an enterprise asset. You must perform these tasks if you set the **Move type** field to **Ship** in an enterprise move line.

Before you begin
Before you can proceed with the shipment, you must complete the Prepare task for the enterprise asset. See Complete the Prepare task for a moving enterprise asset for detailed instructions.

Role required: sn_eam.enterprise_asset_manager, sn_eam.enterprise_admin, or enterprise_asset_technician

Procedure
1. From the Enterprise Asset Workspace, navigate to **Asset operations** > **Moves** > **Move orders**.
2. From the list of available move orders, select the move order that you want to complete.
   The move order record opens.
3. On the move order record, select the **Enterprise move lines** tab.
4. From the list of available enterprise move lines, select the enterprise move line for the enterprise asset that you want to move.
   The enterprise move line record opens.
5. Complete and close the Ship task for the enterprise move line.
   To successfully complete and close this task, the enterprise asset must be shipped to the target location.

   a. On the **Enterprise move tasks** tab, select the task number for the **Ship** task.

      Alternatively, select the task number that is displayed in the **Current task** field of the enterprise move line record header.

      The Ship task opens.

   b. On the **Details** tab of the Ship task, fill in the fields.

Details tab

Field	Description
Enterprise move task	
Assignment group	Group that the task is assigned to. This field populates automatically based on the group that the entire move order is assigned to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Assigned to	User who the task is assigned to. This field populates automatically based on the user who the entire move order is assigned to.
Scheduled date	Date and time at which the task is scheduled to be completed.
Priority	Priority of the task.
Shipment details	
Shipping carrier	Shipping carrier through which the enterprise asset was shipped.
Ship date	Date on which the enterprise asset was shipped.
Tracking number	Tracking number that enables you to track the status and location of the shipment.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.

The Ship task is automatically updated with a state of Closed Complete. The Enterprise Asset Management application then automatically generates a corresponding Receive task for the enterprise move line.

6. Complete and close the Receive task for the enterprise move line.
To successfully complete and close this task, the enterprise asset must be received at the target location.

a. On the **Enterprise move tasks** tab, select the task number for the **Receive** task.

Alternatively, select the task number that is displayed in the **Current task** field of the enterprise move line record header.

The Receive task opens.

b. On the **Details** tab of the Receive task, fill in the fields.

Details tab

Field	Description
Enterprise move task	
Assignment group	Group that the task is assigned to. This field populates automatically based on the group that the entire move order is assigned to.
Assigned to	User who the task is assigned to. This field populates automatically based on the user who the entire move order is assigned to.
Scheduled date	Date and time at which the task is scheduled to be completed.
Priority	Priority of the task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.

The Receive task is automatically updated with a state of Closed Complete.

Result
The enterprise move line is automatically updated with a status of Completed.

What to do next
Move all remaining enterprise assets that are included in the move order. After all corresponding enterprise move lines reach a status of Completed, the move order is complete.

Onboarding multiple enterprise assets in the Enterprise Asset Workspace

Onboard multiple enterprise assets at one go by creating onboarding orders in the Asset operations view.

As an enterprise asset technician, you should perform the following actions to initiate the onboarding of enterprise assets:

1. Create an onboarding order.
2. Add details of the assets that you want to onboard and submit the onboarding order.

The enterprise asset manager reviews and completes the activities listed in the Onboarding playbook to onboard the requested assets. For details, see Create a multi-asset onboarding process.

Create an onboarding order for enterprise assets in the Enterprise Asset Workspace

Create an onboarding order in the Asset operations view to initiate the onboarding of multiple enterprise assets.

Before you begin
Role required: sn_eam.enterprise_asset_technician

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Asset operations**.
2. From the **Onboarding** list, select **Onboarding order**.
3. Select **New**.
4. On the form, fill in the fields.

Create New Asset Onboarding form

Field	Description
Requested for	Person for whom the asset is requested.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	This field is optional.
Stockroom	Stockroom where onboarded asset will be stored. This field is required. **Note:** When you select the stockroom, the **Location** field is automatically populated with the stockroom location.
Due date	Date by when the asset onboarding should be complete. This field is optional.

5. Determine whether you want to onboard assets of an existing model or a new model.

Type of asset model	Action
Existing model	In the **Model** field, select the asset model.
New model	**a.** Select the **Is new model** check box. **b.** Enter the values in the following fields: ▪ **Manufacturer name** ▪ **Model name** ▪ **Model number** ▪ **Short description**

6. Select **Save**.

Result

- An onboarding order in the Draft stage is created and displayed in the Onboarding order list.
- The **Add asset details** option is displayed on the onboarding order.

What to do next

Add asset details to the onboarding order. For details, see Add details of the enterprise assets to an onboarding order.

Add details of the enterprise assets to an onboarding order

Specify the details of the enterprise assets that you want to onboard through an onboarding order.

Before you begin

Role required: sn_eam.enterprise_asset_technician

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Asset operations**.
2. From the **Onboarding** list, select **Onboarding order**.
3. Select the onboarding order for which you want to add asset details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Select **Add asset details**.
5. In the **Add assets** dialog box, enter the asset details.
   The **Serial number** field is required. You can also enter the values for the following fields:
   - **Asset tag**
   - **RFID tag**
   - **MAC address**
   - **Additional info**
6. For each asset that you want to onboard, select the Add Row icon + and enter the asset details.
7. Select **OK**.
8. Select **Save**.
   The assets that you added to the onboarding order are displayed in the **Onboarding Assets** tab.
9. Select **Submit**.

Result

- The stage of the onboarding order changes to Review.
- A Multi-asset onboarding task is created and displayed in the **Onboard Asset Tasks** tab.

Normalizing enterprise models

To standardize enterprise models, the data must be normalized. The normalization process enables you to normalize your manufacturer, model name, model number, and model type data of your enterprise models.

If a specific model type, library, or product model is not available in the Enterprise Asset Management Content Service, you have the option to create a custom enterprise model type, custom enterprise model library, or custom enterprise product model. If you are using the Operational Technology (OT) Asset Management application, you also have the options to create custom United Nations Standard Products and Services Code (UNSPSC) firmware classifications, custom firmware products, custom firmware versions, and custom firmware mappings for your Customer Premises Equipment (CPE).

Import and export content data for Enterprise Asset Management

Import and export content data to the ServiceNow Enterprise Asset Management Content Service to improve the normalization process. On-premise users can use the Manage Enterprise Library module to import or export data via a zip file.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **All** > **Modules** > **Manage Enterprise Library**.
2. Open the Manage Enterprise Library form layout and select the **Active** check box to activate the module.
3. Select **Save** and refresh the form layout.
4. Navigate to the Manage Enterprise Library module.
5. Import the content data to get the new data into your system.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select **Import Enterprise Library Content**.

b. Select **Attach Content File** and then select the zip file that contains the content.

c. Select **Run Import**.
After the data is imported, the content update schedule job, *EAM - Apply latest content changes*, is triggered to process the content updates.

6. Export content to send the custom data or any enterprise models that are not fully normalized to the ServiceNow content service team.

a. Select **Content Service Opt-in: Export Enterprise Normalization Content**.

b. If you already haven't opted in to share the data with ServiceNow content service, select **opt-in** and refresh the Manage Enterprise Library page.
For details on opting-in, see Opt-in to the Enterprise Asset Management Content Service.

c. Select **Run Export**.

d. After the status changes to Ready for Download, refresh the page.
A zip file is created and appears at the top of the Manage Enterprise Library page. If there is no content to export, an error message appears informing you that no content exists.

e. Download and send this zip file to the ServiceNow content service team.

Create custom enterprise model type

If you have an enterprise model type that isn't represented in the Enterprise Asset Management Content Service yet, you can create a custom model type.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Normalization**.
2. Select the **Custom enterprise model type** tab.
3. Select **New**.
4. Fill in the form details.

Field	Description
Name	Display name of the enterprise model type.
UNSPSC commodity ID	United Nations Standard Products and Services Code of the model type.
Description	A detailed description of the enterprise model type.
Active	Indicates that the model is active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select **Save**.
   After the model type is created, normalize the model type.

Create custom enterprise model library

If you have an enterprise model library that isn't represented in the Enterprise Asset Management Content Service yet, you can create a custom model library.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Normalization**.
2. Select the **Custom enterprise model libraries** tab.
3. Select **New**.
4. Fill in the form details.

Field	Description
Model number	Assign a number to the model.
Model name	Name of the model.
Description	A detailed description of the model.
Active	Indicates that the model is active.
Exclude from content service	Option that excludes the model library details from being transferred to the Enterprise Asset Management Content Service even though you opted-in.

5. Select **Save**.
   After the model library is created, normalize the model library.

Create custom enterprise product models

If you have a product model that is not represented in the Enterprise Asset Management Content Service yet, you can create a custom product model.

Before you begin

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Normalization**.
2. Select the **Custom enterprise product models** tab.
3. Select **New**.
4. Fill in the form details.

Field	Description
Model Name	Name of the enterprise product model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Manufacturer	Name of the manufacturer of the enterprise product model.
Model type	The model type.
Description	A detailed description of the product model.
Active	Indicates that the model is active.
Exclude from content service	Option that excludes the product model details from being transferred to the Enterprise Asset Management Content Service even though you opted-in.

5. Select **Save**.
   After the product model is created, normalize the product model.

Revert normalization

You can revert the normalization of enterprise models in the Enterprise Asset Workspace.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

Enterprise models with a status of **Fully Normalized**, **Partially Normalized**, **Manufacturer Normalized**, or **Manually Normalized** can be reverted. All the normalized fields present in the model are reverted and the normalization status changes to **Match not Found**.

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Enterprise model management**.
2. Open an enterprise model record that is already normalized.
3. Select **Revert Normalization**.
4. Select **OK** on the confirmation message box.

   Once the revert normalization process is complete, the following changes take place:

   - fields are reset to their original values and any rule associated with the enterprise model is deactivated.
   - After deactivation of the rule, revert normalization is run on all models that were normalized using that rule before.
   - The deactivated rule can no longer normalize any more models. The deactivated rule can't be reactivated. It is a one time procedure.
   - The **Revert Normalization** option on the model record is replaced with the **Normalize** option.

Normalizing firmware for operational technology (OT) assets

To standardize the publisher, product, and version of the firmware that is embedded into your OT assets, you must normalize the corresponding data in the associated firmware discovery models. By standardizing this information, you can track and manage your firmware more accurately and efficiently.

Note: You can standardize this information only in the OT Asset Management application. See OT Asset Management for more information on the application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To begin standardizing this information, you must use a discovery tool, such as the ServiceNow® Discovery application, to discover all firmware installations across your OT asset deployment. Each discovered firmware installation is associated with a corresponding firmware discovery model, which provides information about the discovered firmware publisher, discovered firmware product, and discovered firmware version. After the discovery process is complete, normalization runs on the associated firmware discovery models, matching the discovered firmware publishers, discovered firmware products, and discovered firmware versions against normalized equivalents in the Enterprise Asset Management Content Library. Each discovered firmware installation is then updated with a firmware model containing the normalized firmware publisher, firmware product, and firmware version that best match the associated firmware discovery model.

If a specific United Nations Standard Products and Services Code (UNSPSC) firmware classification, firmware product, firmware version, or Customer Premises Equipment (CPE) firmware mapping is not available in the Enterprise Asset Management Content Library, you can create a custom UNSPSC firmware classification, custom firmware product, custom firmware version, or custom CPE firmware mapping.

Import and export content data for firmware in your operational technology (OT) assets

Import and export content data for firmware that is embedded into your on-premise OT assets. Share this data with the Content Service team so that you can help improve the normalization process.

Before you begin

Important: You can import and export this firmware content data only the in OT Asset Workspace. To use the OT Asset Workspace, install the OT Asset Management application on your ServiceNow instance. See Install OT Asset Management from the ServiceNow Store for detailed instructions.

Important: To import and export this firmware content data, set the *sn_itam_common.onprem_content_import_export* system property to `true` on your ServiceNow instance. In addition, opt in to the Enterprise Asset Management Content Service and verify that the Custom Firmware Models KPI is enabled. See Opt-in to the Enterprise Asset Management Content Service for detailed instructions.

Role required: sn_otam.ot_asset_manager

Procedure

1. Navigate to **All** > **OT Asset Workspace** > **Admin center**.
2. Import firmware content data onto your ServiceNow instance.
   a. From the navigation menu of the Admin center view, navigate to **Manage library** > **Import firmware content**.
   b. Select the Attachments icon on the sidebar of the Import page.
   c. In the Attachments window, select **Select a file**.
   d. When prompted, search for and select the zip file that contains your firmware content data.
   e. In the Upload a file dialog box, select **Upload**.
   f. After the dialog box closes, select **Run Import** on the Import page.
   After the content data is successfully imported, the OT Asset Management application automatically triggers the *EAM - Apply latest content changes* scheduled job to process any corresponding content updates, which you can then use to normalize your firmware.
3. Export firmware content data from your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

By exporting your firmware content data, you can share any custom or partially normalized firmware with the Content Service team. In addition, you can share data for your firmware versions, firmware models, and firmware life cycles.

a. From the navigation menu of the Admin center view, navigate to **Manage library** > **Export firmware content**.

b. Select **Run Export**.
The OT Asset Management application compresses all of your firmware content data into a single zip file. When the zip file is ready for download, the page automatically reloads.

c. Select the Attachments icon on the sidebar of the Export page.

d. In the Attachments window, select the Actions icon for the zip file that you want to download.

e. Download the zip file and then send it to the Content Service team.

Create a custom United Nations Standard Products and Services Code (UNSPSC) classification for firmware in your operational technology (OT) assets

If the UNSPSC classification for any firmware that is embedded into your OT assets isn't already represented in the Enterprise Asset Management Content Service, create a custom UNSPSC classification.

Before you begin

Important: You can create custom UNSPSC classifications only using the OT Asset Workspace. To use the OT Asset Workspace, install the OT Asset Management application on your ServiceNow instance. See Install OT Asset Management from the ServiceNow Store for detailed instructions.

Role required: sn_eam.enterprise_admin

About this task

The UNSPSC is a global multi-sector standard for classifying products and services. It encompasses a five-level hierarchical codeset that enables you to classify products and services at grouping levels relevant to your needs. You can use the UNSPSC to classify the firmware that is embedded into your industrial- and hardware-based OT assets.

Procedure

1. Navigate to **All** > **OT Asset Workspace** > **Normalization**.
2. Select the **Custom firmware UNSPSC** tab.
3. Select **New**.
4. On the form, fill in the fields.

Create New Custom UNSPSC firmware classification form

Field	Description
UNSPSC commodity ID	Eight-digit numeric code that identifies the firmware that is embedded into your OT assets.
UNSPSC title	Title of the UNSPSC classification.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
UNSPSC description	Description of the UNSPSC classification.
Active	Option that indicates if the UNSPSC classification is active.
Exclude from content service	Option that excludes the UNSPSC classification from being shared with the Enterprise Asset Management Content Service.

5. Select **Save**.

Create a custom firmware product for your operational technology (OT) assets

If the firmware product that is embedded into your OT assets isn't already represented in the Enterprise Asset Management Content Service, create a custom firmware product.

Before you begin

Important: You can create custom firmware products only using the OT Asset Workspace. To use the OT Asset Workspace, install the OT Asset Management application on your ServiceNow instance. See Install OT Asset Management from the ServiceNow Store for detailed instructions.

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **All** > **OT Asset Workspace** > **Normalization**.
2. Select the **Custom firmware products** tab.
3. Select **New**.
4. On the form, fill in the fields.

Create New Custom firmware product form

Field	Description
Manufacturer	Manufacturer of the firmware product.
Product	Name of the firmware product.
UNSPSC classification	Eight-digit numeric code that identifies the firmware product.
Description	Description of the firmware product.
Active	Option that indicates if the firmware product is active.
Exclude from content service	Option that excludes the firmware product from being shared with the Enterprise Asset Management Content Service.

5. Select **Save**.

Result

The custom firmware product is created. If any existing firmware publisher uses the same manufacturer as the custom firmware product, the Enterprise Asset Management application automatically associates that firmware publisher with the custom firmware product. Otherwise, the Enterprise Asset Management application creates a custom firmware publisher to associate with the custom firmware product.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a custom firmware version for your operational technology (OT) assets

If the version of the firmware that is embedded into your OT assets isn't already represented in the Enterprise Asset Management Content Service, create a custom firmware version.

Before you begin

Important: You can create custom firmware versions only using the OT Asset Workspace. To use the OT Asset Workspace, install the OT Asset Management application on your ServiceNow instance. See Install OT Asset Management from the ServiceNow Store for detailed instructions.

Role required: sn_eam.enterprise_admin

Procedure

1. Navigate to **All** > **OT Asset Workspace** > **Normalization**.
2. Select the **Custom firmware versions** tab.
3. Select **New**.
4. On the form, fill in the fields.

Create New Custom firmware product version form

Field	Description
Version	Firmware version.
Product	Firmware product that the firmware version applies to.
Next version available	Option that indicates if the next firmware version is currently available.
Active	Option that indicates if the firmware version is active.
Exclude from content service	Option that excludes the firmware version from being shared with the Enterprise Asset Management Content Service.

5. Select **Save**.

View firmware models discovered on your Operational Technology (OT) assets

Get the details of all the firmware models that the discovery tool discovered on your Operational Technology (OT) assets.

Before you begin

Important: The OT Asset Management application must be activated to access the OT Asset Workspace. For details, see Install OT Asset Management from the ServiceNow Store.

Role required: sn_otam.ot_asset_manager

About this task

The Discovered firmware model [sn_ent_discov_firmware_model] table stores the details of the firmware models discovered on your OT assets.

Procedure

1. Navigate to **Workspaces** > **OT Asset Workspace** > **OT model management**.
2. Select the **Firmware discovered** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The list of all the installed firmware models that are discovered is shown with the following details:

- **Discovered manufacturer**: Name of the firmware manufacturer.
- **Discovered model**: Firmware model that's discovered on the OT asset.
- **Discovered model number**: Model number of the discovered firmware model.
- **Discovered version**: Version number of the discovered firmware model.
- **Normalization status**: Status of discovered firmware model normalization. This field can have one of the following values:
  - **New**: The discovered firmware model has not yet run-through the normalization process.
  - **Match not found**: The normalization process couldn't match any of the fields of the discovered firmware model. This status could also occur when a normalization rule doesn't exist for the firmware model.
  - **Manually normalized**: Firmware model is normalized manually.
  - **Normalized**: The discovered firmware model is normalized by the background job, and a firmware model is created in the Firmware model [sn_ent_firmware_model] table. A firmware model is normalized only when the publisher, product, model, model number, and version are available.
  - **Partially normalized**: The normalization process could at least match the product value.
  - **Publisher normalized**: The normalization process could only match the publisher value.
- **Normalized firmware model**: Firmware model that's created after the discovered firmware model is normalized.

  Important: A firmware model is created only when the discovered firmware model is either normalized or manually normalized by specifying the product and version details.

- **Updated**: Date and time when the discovered firmware model was last updated.

3. Select a record to view the details.
   The form displays the information related to the discovered firmware model in the Details and the Normalization sections.

Create a custom Common Platform Enumeration (CPE) mapping for firmware in your operational technology (OT) assets

If the CPE mapping for firmware that is embedded into your OT assets isn't already represented in the Enterprise Asset Management Content Service, create a custom CPE mapping.

Before you begin

Important: You can create custom CPE mappings only using the OT Asset Workspace. To use the OT Asset Workspace, install the OT Asset Management application on your ServiceNow instance. See Install OT Asset Management from the ServiceNow Store for detailed instructions.

Role required: sn_eam.enterprise_admin

About this task

CPE is a standardized naming scheme that enables you to map your information technology (IT) systems, software, and packages to corresponding vulnerability management data in the National Vulnerability Database (NVD). You can use these mappings to identify and mitigate potential vulnerabilities across your IT infrastructure. All official CPE names are listed in the CPE

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Product Dictionary, which is hosted and maintained by the National Institute of Standards and Technology (NIST).

Procedure

1. Navigate to **All** > **OT Asset Workspace** > **Normalization**.
2. Select the **Custom firmware CPE** tab.
3. Select **New**.
4. On the form, fill in the fields.

Create New Custom firmware CPE mapping form

Field	Description
Firmware product	Firmware product that you want to map to vulnerability management data in the NVD.
Firmware version	Version of the firmware product that you want to map to vulnerability management data in the NVD.
CPE publisher	Publisher of the firmware product, as listed in the CPE Product Dictionary.
CPE product	Name of the firmware product, as listed in the CPE Product Dictionary.
CPE version	Version of the firmware product, as listed in the CPE Product Dictionary.

5. Select **Save**.

Create a firmware model for the firmware embedded into your Operational Technology (OT) assets

Create a firmware model for the firmware that's embedded into your OT assets if the model isn't already represented in the Enterprise Asset Management Content Service.

Before you begin

Important: The OT Asset Management application must be activated to access the OT Asset Workspace. For details, see Install OT Asset Management from the ServiceNow Store.

The firmware product and the firmware version details should be available in the Enterprise Asset Management Content Service. If not, you can also create the firmware product and the firmware version for your firmware model. For more details, see Create a custom firmware product for your operational technology (OT) assets and Create a custom firmware version for your operational technology (OT) assets.

Role required: sn_otam.ot_asset_manager

Procedure

1. Navigate to **Workspaces** > **OT Asset Workspace** > **OT Model Management**.
2. Select the **Firmware** tab.
3. Select **New**.
4. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Firmware model form

Field	Description
Display name	Name of the firmware model. This field is populated automatically with a value that's based on the **Publisher**, **Product**, and **Version** fields.
Publisher	Manufacturer of the firmware model.
Product	Name of the firmware product. This field is required.
Version	Version of the firmware.This field is required.
Next version available	Option that indicates if the next firmware version is available.
Manually created	Option that indicates that the firmware version is created manually. The check box is automatically selected.

5. Select **Save**.

Result

- A firmware model is created and listed in the **Firmware** tab.
- The firmware model record displays the following related lists:
  - Discovered firmware
  - Firmware installations
  - Firmware model lifecycles
  - Knowledge
- The lifecycle phases associated with the firmware model are listed in **Firmware model lifecycles** tab only if that firmware version has lifecycles defined in the Firmware lifecycle definition [sn_itam_firmware_lifecycle_def] table.

Normalize the firmware embedded into your Operational Technology (OT) assets manually

Standardize the publisher, product, and version details of the firmware that is embedded into your OT assets by normalizing the discovered firmware models manually.

Before you begin

Important: The OT Asset Management application must be activated to access the OT Asset Workspace. For details, see Install OT Asset Management from the ServiceNow Store.

The firmware product and the firmware version details of the discovered firmware model that you want to normalize should be available in the Enterprise Asset Management Content Service. If not, you can also create the firmware product and the firmware version for your firmware model. For more details, see Create a custom firmware product for your operational technology (OT) assets and Create a custom firmware version for your operational technology (OT) assets.

Role required: sn_otam.ot_asset_manager

Procedure

1. Navigate to **Workspaces** > **OT Asset Workspace** > **OT model management**.
2. Select the **Firmware discovered** tab.
3. Select the discovered firmware model that you want to normalize.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. On the form, fill in the details in the Normalization section.

Normalization section

Field	Description
Normalized publisher	Name of the firmware manufacturer.
Normalized product	Name of the firmware product.
Normalized version	Version of the discovered firmware.
Exclude from content service	Option that excludes the firmware model details from being shared with the Enterprise Asset Management Content Service.

5. Select **Save**.

Result
The Normalization status changes to Manually Normalized.

Revert normalization of firmware models

Revert the normalization of firmware models in the OT Asset Workspace.

Before you begin
Important: The OT Asset Management application must be activated to access the OT Asset Workspace. For details, see Install OT Asset Management from the ServiceNow Store.

Role required: sn_otam.ot_asset_manager

About this task
Normalization of firmware models with a Normalization status of **Normalized**, **Partially normalized**, **Publisher normalized**, or **Manually normalized** can be reverted.

Procedure
1. Navigate to **Workspaces** > **OT Asset Workspace** > **OT model management**.
2. Select the **Firmware discovered** tab.
3. Select the normalized discovered firmware model for which you want to revert normalization.
4. Select **Revert Normalization**.

Result
After the revert normalization process is complete, the following changes take place:

- All the normalized fields present in the firmware model are reverted and the normalization status changes to **Match not found**.
- The normalization rule associated with the firmware model gets deactivated. The deactivated rule can no longer normalize any more firmware models. The deactivated rule can't be reactivated. It’s a one-time procedure.
- After deactivation of the normalization rule, revert normalization is run on all models that were normalized using that rule earlier.
- The **Revert Normalization** option on the model record is replaced with the **Normalize** option.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create knowledge articles for firmware models

Attach helpful and relevant knowledge articles to the firmware model in the OT Asset Workspace.

Before you begin

Important: The OT Asset Management application must be activated to access the OT Asset Workspace. For details, see Install OT Asset Management from the ServiceNow Store.

Role required: sn_otam.ot_asset_manager

Procedure

1. Navigate to **Workspaces** > **OT Asset Workspace** > **OT Model Management**.
2. Select the **Firmware** tab.
3. Select the firmware model for which you want to attach the knowledge article.
4. Select the **Knowledge** tab.
5. Select **New**.
6. On the Create New Knowledge form, select the knowledge article that you want to add in the **Knowledge** field.
7. Select **Save**.

Related topics

Create a knowledge article for Enterprise Asset Management

Knowledge Management

Create life-cycle definitions for your firmware models

Manage the complete life cycle of firmware models by adding life-cycle information in the OT Asset Workspace.

Before you begin

Important: The OT Asset Management application must be activated to access the OT Asset Workspace. For details, see Install OT Asset Management from the ServiceNow Store.

Role required: sn_otam.ot_asset_manager

About this task

Note: If the life-cycle phases of your firmware version are defined in the Enterprise Asset Management Content Service, then the life-cycle phase details are automatically populated for that firmware model record.

Procedure

1. Navigate to **Workspaces** > **OT Asset Workspace** > **OT model management**.
2. Select the **Firmware** tab.
3. Select the firmware model for which you want to add life-cycle details.
4. Select the **Firmware model lifecycles** tab.
5. Select **New**.
6. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Firmware model lifecyle form

Field	Description
Model	Name of the model. This field is read only.
Lifecycle type	Type of life cycle. The available values are: ○ **Internal** **Note:** For the Internal life-cycle type, the life-cycle information isn't shared with your ServiceNow instance during the reverse push. ○ **Publisher**
Lifecycle phase	Phase of the life cycle. The available values are: ○ **General availability** ○ **End of sale** ○ **End of support** ○ **End of extended support** ○ **End of life**
Source	Source of the firmware model.
Risk	Risk associated with the life cycle.
Description	Description of the firmware model.
Phase start date	Start date of the life-cycle phase. This field is required.
Phase end date	End date of the life-cycle phase.
Current lifecycle phase	Option that indicates if it’s the current life cycle of the firmware model.
Active	Option that indicates if the firmware model life cycle is active.

7. Select **Save**.

Result
The life-cyle phase is listed in the **Firmware model lifecycles** tab.

Managing incidents in Enterprise Asset Management

Incident managers or users with the itil role configure the Enterprise Asset Management application by creating, updating, and resolving IT incidents for enterprise assets.

Create an Enterprise Asset Management incident

Create an incident record to document a deviation from an expected Enterprise Asset Management standard of operation.

Before you begin
Role required: itil

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To create an Enterprise Asset Management incident record, you must install all applicable Incident Management plugins on your ServiceNow instance. See Incident Management plugins for the complete list of Incident Management plugins.

About this task

This procedure describes how an ITIL agent must complete an incident form to document and track an Enterprise Asset Management incident. Refer to Incident Management for more in-depth information on creating and managing incidents.

Procedure

1. Create an incident.
   After your incident is created, you are automatically redirected to the Incidents list.
2. From the list of available incidents, select the incident that you created in the previous step.
3. On the form header of your incident record, select the Additional actions menu icon ( ) and then select **View** > **Enterprise Asset**.
   This option sets your incident record to the Enterprise Asset Management incident form view, which contains additional fields that are specific to Enterprise Asset Management.
4. After the form reloads in the Enterprise Asset Management incident form view, specify the asset that is affected by this incident.

   a. Select the Lookup using list icon in the **Asset** field.

   b. In the Assets pop-up window, search for and select the asset that is affected by this incident.
   The pop-up window closes and you automatically return to the Incident form.

   c. On the form header, select the Additional actions menu icon and then select **Save**.

   When the form reloads, the **Configuration item** field and **Affected Assets** related list update automatically based on the asset that you selected.

   Note: The **Configuration item** field remains empty if you select a consumable asset.

   Important: If you select a multi-component asset, the **Affected Assets** related list displays only the parent asset. You must manually add each child asset that is affected by this incident. See step 5 for more details.

5. If you selected a multi-component asset in the previous step, specify the child assets that are affected by this incident.

   a. On the **Affected Assets** related list, select **Edit**.

   b. In the Collection list on the Edit Members form, search for and select a child asset that is affected by this incident.

   Note: By default, the Edit Members form automatically runs a search filter to display only the relevant child assets in the Collection list.

   c. Select the Add icon to move the selected child asset to the Affected Assets List.

   d. Repeat steps b and c for each child asset that is affected by this incident.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. Select **Save**.

f. After you return to the Incident form, select **Update**.

What to do next
Resolve and close your incident.

Resolve and close an Enterprise Asset Management incident

Take action on the assets that are affected by an Enterprise Asset Management incident so that you can resolve and close the incident.

Before you begin
Role required: itil

Procedure
1. Navigate to **All** > **Incident** > **All**.
2. From the list of available incidents, select the Enterprise Asset Management incident that you want to resolve and close.
3. Specify what actions you want to take on the assets that are affected by the incident.

   a. On the Incident form, select the **Affected Assets** related list.

   b. From the list of affected assets, double-click the **Asset action** field for the asset that you want to take action on.

   c. When prompted, select the action that you want to take on the asset.

   d. Select the Save icon .

   e. If you choose to swap the asset, specify the asset that you are swapping the existing asset with.

      i. Double-click the corresponding **Swapped Asset** field.

      ii. When prompted, select the Lookup using list icon to search for and select the asset that you want to swap the existing asset with.

      iii. Select the Save icon .

   f. If you are taking action on a consumable asset, specify the number of available assets that you want to take action on.
   You can take action on all available assets or only a portion of the available assets.

      i. Double-click the corresponding **Consumable Quantity** field.

      ii. When prompted, enter the number of available assets that you want to take action on.

      iii. Select the Save icon ( ).

   Important: The **Consumable Quantity** field does not display the updated value automatically. To view the updated value, **Refresh** the **Affected Assets** related list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Based on the actions that you specified in the previous step, update/repair, swap, retire, or take no action on the affected assets.
5. After you have completed taking all necessary actions on the affected assets, provide details about how the incident has been resolved.

   a. Return to your Incident form.

   b. On the **Resolution Information** tab, fill in the fields.

Resolution Information tab

Field	Description
Knowledge	Option to automatically create a knowledge article upon incident closure.
Resolution code	Resolution category that specifies how the incident was resolved.
Resolution notes	Description of how the incident was resolved.
Resolved by	User who resolved the incident.
Resolved	Date and time at which the incident was resolved.

6. On the form header, select **Resolve**.
   The incident is moved to the Resolved state, and you are automatically redirected to the Incidents list. If the asset has any child assets and was in a retired status as indicated in the **Asset action** box, the child assets will be released depending on the kind of asset.

Release of child assets based on type of asset in retired state

Type of asset	Action
Simple	No action
Simple with add-on	All child assets are released to the pending disposal state.
User-assembled	All child assets are released to the pending disposal state.
User-assembled with add-on	All child assets are released to the pending disposal state.
Pre-assembled	No action
Pre-assembled with add-on	All add-on assets are released to the pending disposal state.

   The incident is moved to the Resolved state, and you are automatically redirected to the Incidents list.
7. From the list of available incidents, select the incident that you just resolved.
8. On the form header, select **Close Incident**.
   The incident is closed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Managing enterprise asset inventory and contracts

Create and manage your enterprise asset inventory and contracts.

Overview of managing enterprise inventory and contracts

Create and manage your enterprise asset inventory and contracts by performing the following tasks.

Task	Role required	Resources
Create and view stockrooms		• Create stockroom for enterprise assets • View stockroom details in the Enterprise Asset Workspace
Manage asset picking within your stockroom		Manage enterprise asset picking within your stockrooms
Audit enterprise asset inventory		Audit enterprise asset inventory
Create a disposal or a transfer order		• Create a disposal order in the Enterprise Asset Workspace • Create a transfer order in Enterprise Asset Workspace
Request a loaner asset		Request a loaner asset in Enterprise Asset Workspace
Request a RMA for defective assets		Requesting a Return Merchandise Authorization (RMA) for defective enterprise assets
Manage recalled enterprise assets		Managing recalled enterprise assets
Close an enterprise asset reclamation request		Close an enterprise asset reclamation request
Manage repair of defective assets		Manage repair of defective assets in your stockroom in the Enterprise Asset Workspace
Create contracts for leased enterprise assets		Create a contract for your leased enterprise assets
Manage expiring contracts		Managing expiring contracts for leased enterprise assets

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Create a stockroom and assign assets to the stockroom
- Create a custom stock rule to automatically resupply a stockroom with an asset
- Create a transfer order to transfer assets from one location to the other.
- Create a disposal order for assets that have reached the end of their life or are no longer functional.

Create stockrooms to assign assets to the stockroom.

Create and manage enterprise asset inventory

Keep track of your enterprise assets by efficiently managing inventory.

You can create various types of contracts for your enterprise assets, including lease, insurance, maintenance, warranty, purchase agreement, non-disclosure, terms & conditions, service, purchase order, software license, and subscription contracts.

Contracts are legally binding agreements that define mutual obligations between two or more parties. These obligations can include the contract start and end dates, terms and conditions, renewal information, financial terms, and covered users or assets.

For details on how to create insurance, maintenance, warranty, purchase agreement, non-disclosure, terms & conditions, and service contracts for your enterprise assets, see Create a contract. For details on how to create contracts for your leased enterprise assets, see Create a contract for your leased enterprise assets.

Create stockroom for enterprise assets

Create a stockroom in the Enterprise Asset Management application and assign assets to it.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterptrise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Inventory** > **All stockrooms**.
2. Select **New**.
3. On the form, fill in the fields.

Create New Stockroom form

Field	Description
Name	Display name and identifier of the stockroom.
Assignment group	Group that primarily uses the stockroom.
Manager	Person in charge of the stockroom. Receives restocking notifications and requests for the stockroom's stock rules.
Location	Physical location of the stockroom.
Type	Type of stockroom. Choose from the following options: ○ Central Warehouse ○ Field Agent ○ FSL

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ On site ○ PUDO ○ Warehouse
Hours of operation	Hours during which the stockroom operates.
Description	Description of the stockroom.
Exclude from distribution channels	Option to exclude the stockroom from all stockroom distribution channels, which link stockrooms together for more efficient asset sourcing and transfers.
Exclude from service locations	Option to exclude the stockroom from all service locations in which you are completing work orders or work order tasks.
Warehouse tasks required	Option to enable the Asset pick task and Asset put away task for the stockroom.
External	Indicates if this stockroom is managed internally (check box is cleared) or is managed externally by a third party (check box is selected).
Sourcing by AI Agents	
Auto-consume	Asset sourcing option that helps you fulfill enterprise asset requests autonomously. This option enables AI agents to automatically use assets that are available in this stockroom.
Auto-purchase	Asset sourcing option that helps you fulfill enterprise asset requests autonomously. This option enables AI agents to automatically generate purchase orders for assets that are not currently available in this stockroom.
Auto-transfer	Asset sourcing option that helps you fulfill enterprise asset requests autonomously. This option enables AI agents to automatically generate transfer orders to move assets between this stockroom and any other stockroom that has this option enabled.

4. Select **Save**.
   The newly created stockroom appears in the **All stockrooms** tab.

Add a distribution channel to a stockroom in the Enterprise Asset Workspace

Add a distribution channel to a stockroom so that you can link that stockroom with other geographically-related stockrooms. By linking your stockrooms, you can efficiently source and transfer assets between those stockrooms. You can also assign a rank to each linked stockroom to specify the order of stockrooms that you can source and transfer assets between.

Before you begin

Role required: sn_eam.enterprise_admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From the Enterprise Asset Workspace, open the Inventory view.
2. On the **All stockrooms** tab, select the stockroom that you want to add a distribution channel to. The stockroom record opens.
3. On the **Distribution Channel** tab of the stockroom record, select **New**.
4. On the form, fill in the fields.

Create New Stockroom Distribution Channel form

Field	Description
Channel Stockroom	Stockroom that you want to link as part of the distribution channel.
Rank	Rank of the stockroom that you want to link. If the distribution channel contains more than one linked stockroom, this rank corresponds directly with the order of linked stockrooms that you can source and transfer assets between. Enter a numerical value, such as `1` or `5`. The lower the numerical value is, the higher the stockroom is within the order of linked stockrooms.
Active	Option that indicates if the linked stockroom is active within the distribution channel.

5. Select **Save**.
6. Repeat steps 3 to 5 for each stockroom that you want to link as part of the distribution channel.

Add service locations to a stockroom in the Enterprise Asset Workspace

Add service locations to a stockroom so that you can source, deploy, and retire its assets across multiple geographic locations.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

By default, you can source, deploy, and retire the assets of a stockroom only within the specified stockroom location. By adding additional service locations to a stockroom, you can source, deploy, and retire its assets across various locations.

Procedure

1. From the Enterprise Asset Workspace, open the Inventory view.
2. On the **All stockrooms** tab, select the stockroom that you want to add service locations to. The stockroom record opens.
3. On the **Service locations** tab of the stockroom record, select **Add**. The Add service locations dialog box opens.
4. In the dialog box, select the check box for every service location that you want to add to the stockroom.
5. Select **Add**.

View stockroom details in the Enterprise Asset Workspace

Use stockroom records to view detailed information about the stockrooms that your enterprise, hardware, consumable, bundle, loaner, and other assets reside in.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

The following stockroom record tabs are available only if you've installed and activated the Hardware Asset Management application on your ServiceNow® instance:

- **Hardware**
- **Bundles**
- **Software Licenses**
- **Other Assets**
- **Hardware Loaner Pool**
- **Hardware Asset Audits**

To install and activate the application, request it from the ServiceNow Store.

Role required: sn_eam.enterprise_admin, sn_eam.enterptrise_asset_manager, or enterprise_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **All stockrooms** tab.
3. From the list of available stockrooms, select the stockroom for which you want to view additional details.
   The stockroom record opens.
4. Use the stockroom record tabs to view additional details about the stockroom.

Stockroom record tabs

Tab	Description
Details	Get a detailed overview of the stockroom, including open stockroom tasks and general stockroom details. The Open stockroom tasks cards show all open orders, audits, and requests that are associated with the stockroom. Select a card to view the list of corresponding order, audit, or request records. If you select a card for any open Hardware Asset Management orders, audits, or requests, the list opens in the Hardware Asset Workspace. In addition, use the interactive map to view the location of the stockroom based on the specified stockroom address. Expand the map to view all supported service locations and all stockrooms that are linked as part of the stockroom distribution channel.
Task Timeline	View the timeline of all stockroom tasks. Each stockroom task is added to the timeline based on either the creation date, the scheduled date, the start or return date, or the shipping date. Select a task to open the corresponding task record. If you select a Hardware Asset Management task, the record opens in the Hardware Asset Workspace. Use the timeline format filter at the top-right corner of the tab to change the format and duration in which you view the timeline. You can choose to view the timeline in a calendar format or timeline

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tab	Description
	format. The calendar format supports the following timeline durations: ○ **Day** ○ **Work Week** ○ **Week** ○ **Month** The timeline format supports the following timeline durations: ○ **Day** ○ **Week** ○ **4 Weeks**
Hardware **Note:** This tab appears only if you have installed and activated the Hardware Asset Management application.	Create and view the hardware assets that reside in the stockroom. If you are creating a hardware asset, you are automatically redirected to the corresponding form in the Hardware Asset Workspace.
Enterprise Assets	Create and view the enterprise assets that reside in the stockroom.
Consumables	Create and view the consumable assets that reside in the stockroom.
Bundles **Note:** This tab appears only if you have installed and activated the Hardware Asset Management application.	Create and view the asset bundles that reside in the stockroom. If you are creating an asset bundle or selecting an existing asset bundle, you are automatically redirected to the corresponding form or record in the Hardware Asset Workspace.
Pallets	Create and view the pallet assets that reside in the stockroom.
Software Licenses **Note:** This tab appears only if you have installed and activated the Hardware Asset Management application.	Create and view the software licenses that reside in the stockroom. If you are creating a software license or selecting an existing software license, you are automatically redirected to the corresponding form or record in the Hardware Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tab	Description
Other Assets **Note:** This tab appears only if you have installed and activated the Hardware Asset Management application.	Create and view all other types of assets that reside in the stockroom. If you are creating an asset, you are automatically redirected to the corresponding form in the Hardware Asset Workspace.
Hardware Loaner Pool **Note:** This tab appears only if you have installed and activated the Hardware Asset Management application.	View all hardware loaner assets that reside in the stockroom. If you select a loaner asset, you are automatically redirected to the corresponding record in the Hardware Asset Workspace.
Enterprise Loaner Pool	View all enterprise loaner assets that reside in the stockroom.
Service Locations	View all service locations that are supported by the stockroom.
Distribution Channel	Create and view the list and ranking of all linked stockrooms that you can source and transfer enterprise assets between. For more information on distribution channels, see Add a distribution channel to a stockroom in the Enterprise Asset Workspace.
Hardware Asset Audits **Note:** This tab appears only if you have installed and activated the Hardware Asset Management application.	Create and view audits for your hardware asset inventory. If you are creating an audit or selecting an existing audit, you are automatically redirected to the corresponding form or record in the Hardware Asset Workspace.
Enterprise Asset Audits	Create and view audits for your enterprise asset inventory.

5. View all active stock rules that are configured for the stockroom.

   a. From the sidebar of the stockroom record, select the Stock rules icon .

   b. View each stock rule to determine if your available stock is within the specified threshold. You can also determine if the corresponding model has reached the end of sale.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a stock rule for enterprise assets

Create a stock rule to automatically resupply a stockroom based on vendor purchase orders or transfer orders.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

Stock rules control what happens when the inventory of a particular asset in a particular stockroom reaches a specified threshold. When available asset quantity drops below a specified quantity, the stock rule automatically creates an enterprise stock order request. Once the enterprise stock order request is created, the enterprise manager goes through the process of sourcing and receiving that order.

If a stock rule is created for an enterprise model that reaches the threshold limit, a notification is sent to the stockroom manager and a stock order request is automatically created.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory** > **Stock rules**.
2. Select **New**.
   The Create New Stock Rule page opens.
3. On the form, fill in the details.

Model	Product model to which the rule applies.
Threshold	Quantity that the stock must reach to trigger restocking. For example, enter a threshold of 10 for a laptop computer that should be restocked when inventory drops below 10 in the specified stockroom. **Note:** If a stock rule is created for an enterprise model that reaches the threshold limit, a notification is sent to the stockroom manager and a stock order request is automatically created.
Restocking option	Location where additional supplies should come from. If Procurement is not active, then restocking option is Stockroom only. Otherwise, select one of the following: ○ Stockroom: creates a transfer order to obtain the asset from another stockroom. ○ Vendor: sends an email to the stockroom manager to order from a vendor. In addition to the email notification, a purchase order and purchase order line item are created.
Stockroom	Current physical location of the asset.
Order size	Minimum order quantity for stockroom transfers or vendor purchases. ServiceNow

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

	calculates the smallest multiple of the order size needed to restock the item above the threshold. For example, there are 3 laptops in stock with a threshold of 10 and the Stockroom option selected. If the order size is set to 4, the system creates a transfer order for 8 laptops to exceed the threshold and satisfy the rule (3 in stock + 8 ordered = 11). When restocking from a vendor, ServiceNow sends an email to the stockroom manager showing the total number of items to order, as multiples of the order size.
Active	Indicates whether this stock rule active (check box is selected). Clearing this check box prevents the stock rule from restocking automatically.
OT stock rule	Indicates whether the stock rule was created in the OT Asset Workspace. This check box appears on the stock rule form only for hardware models in both the OT Asset Workspace and Enterprise Asset Workspace. However, only the OT asset manager can select or deselect this check box in the OT Asset Workspace.

4. Select **Save**.

Result

- The stock rule that you created appears in the **Stock rules** tab.
- If the restocking option was set to **Vendor**, the **Stock orders** tab will be displayed. All the stock orders that are created using this stock rule are listed under the Stock orders tab.
- If the restocking option was set to **Stockroom**, the **Transfer orders** tab will be displayed. All the transfers orders created using this stock rule are listed under the **Transfer orders** tab.

> **Note:** For stock orders created through the restocking by a vendor, the stock order tab shows all stock orders generated by that stock rule. But for transfer orders, the tab only displays transfer orders after the upgrade.

Stockroom audit access by role

Audit roles determine which stockrooms a user can view and audit. Depending on your application and assigned role, you may have access to all stockrooms or only personal stockrooms.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Stockroom audit roles

Stockroom audit role details

Role	Stockroom scope	Read	Write	Create	Delete
sn_itam_common.personal_stockroom_audit_user	Assigned personal stockrooms only	Yes	Yes	Yes	No
sn_itam_common.personal_stockroom_audit_admin	Personal stockrooms only	Yes	Yes	Yes	Yes
sn_itam_common.asset_audit_user	All stockrooms	Yes	Yes	Yes	No
sn_itam_common.asset_audit_admin	All stockrooms	Yes	Yes	Yes	Yes

Important: Access to the Asset Audits [sn_itam_common_asset_audit] table is no longer granted through the inventory_user role. Assign one of the new audit roles to users who require audit access.

Role hierarchy

The audit roles are organized in the following hierarchy:

- The sn_itam_common.asset_audit_user role is contained within the sn_itam_common.asset_audit_admin role.
- The sn_itam_common.personal_stockroom_audit_user role is contained within the sn_itam_common.personal_stockroom_audit_admin role.

Role assignments by application

Enterprise Asset Management

- The sn_eam.asset_technician role is assigned the sn_itam_common.asset_audit_user role, enabling read, write, and create access on all stockrooms.
- The sn_eam.enterprise_admin role is assigned the sn_itam_common.asset_audit_admin role, enabling full access to all stockroom and location audits, including the ability to delete audit records.

Hardware Asset Management

The ham_admin role is assigned the sn_itam_common.asset_audit_admin role, enabling full access on all stockrooms.

Note: For more details on stockroom auditing in the Hardware Asset Management application, see Audit hardware asset inventory.

Field Service Management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The wm_agent is assigned the sn_itam_common.personal_stockroom_audit_user role, restricting access to personal stockrooms only.
- The wm_admin role receives full access including delete through sn_itam_common.personal_stockroom_audit_admin.

Note: For more details on stockroom auditing in the Field Service Management application, see Perform asset audit for personal stockrooms.

Audit enterprise asset inventory

Audit your enterprise asset inventory to learn where your assets are and what their current status is.

Before you begin

Role required: sn_eam.enterprise_asset_manager, sn_eam.asset_technician, sn_itam_common.asset_audit_user, or sn_itam_common.asset_audit_admin

About this task

You can use the Mobile Agent application for Enterprise Asset Management to scan asset tags or enter them manually. If an asset is scanned but its asset tag does not exist in our database, then by default, that asset is mapped to an unknown model record. The unknown model record appears on the **All enterprise models** tab of the **Model Management** view in the Enterprise Asset Workspace. The asset manager manually associates this asset to the appropriate model. You can't change, update or delete an unknown model.

Note: Starting with Enterprise Asset Management version 9.0, you can also audit the licensed hardware assets in the Enterprise Asset Workspace only if the Hardware Asset Management application is activated.

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Inventory** > **Asset audits**.
2. Select **New**.
   The Create New Enterprise Asset Audit page opens.
3. On the Create New Asset Audits form, fill in the fields.
   For a description of the field values, see Asset audit fields for enterprise assets.
4. Select **Save**.

Result

The asset audit inventory record is created and appears with the **Expected Assets** and **Scanned Assets** tabs.

What to do next

Scan the assets in the inventory using the ServiceNow Agent app.

Related topics

Asset audit fields for enterprise assets

Audit results

Complete a single scan enterprise asset inventory audit using the ServiceNow Agent app

Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Close an enterprise asset remediation task

View the open enterprise asset remediation from the **Inventory** view and close the task after updating the **Model category** and **Model** fields value for the asset.

Before you begin

Role required: asset, and sn_itam_common.asset_audit_admin, or sn_itam_common.asset_audit_user

About this task

A new asset record is created when all of the following are true:

- The audit record's **Scan method** is set to **Multi scan**.
- During asset scanning, a new asset is detected that doesn't exist in the ServiceNow® instance,

For this new asset record, the application can't automatically determine the **Model category** and **Model** field values. These fields are initially set to **Unknown Model Category** and **Unknown Model**. An asset remediation task is then generated to notify you that an asset record has been created with an unknown model category and an unknown product model. In the *Enterprise Asset Workspace*, you can access the open remediation task, update the asset record as required, and then close the remediation task.

Procedure

1. Navigate to **All** > *Enterprise Asset Workspace* > **Inventory view**.
2. Select the **Overview** tab.
3. In the Important Actions section, in the Open asset remediation tasks tile, select **View records**.
   The Open asset remediation tasks list is displayed.
4. Select the task Number link.
   The Asset remediation form is displayed.
5. In the **Asset** field, select the Open Record icon.
   The asset form is displayed. The default value for the **Model category** and **Model** field is displayed in read-only mode.
6. Select the **Update** button.
7. On the form, fill in the details.

To what type of asset would you like to change

Field	Description
Asset type	Type of the asset.
Model category	Model category that the asset can be associated with.
Model	Model that the asset can be associated with.

8. Select **Update**.
   The updated Model category and Model value are displayed in the respective fields.
9. Open the **Details** tab.
   The Asset remediation task form is displayed.
10. Select the **Close Task** button.
    The closed asset remediation task isn't listed on the Open asset remediation tasks list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app

Create a disposal order in the Enterprise Asset Workspace

Create a disposal order for an asset that has reached the end of its life cycle or is no longer functional.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

Only assets that are associated with enterprise or pallet models can be disposed of using an enterprise disposal order. You can add simple assets; multi-component assets, which include pre-assembled and user-assembled assets; and pallet assets with children to an enterprise disposal order.

Note: If you are adding a multi-component asset or a pallet asset with children to a disposal order, any changes that you make to the parent asset are automatically applied to all child assets.

Use the Flow Designer application to create the disposal flow to take you through the entire asset disposal order process.

The disposal order goes through various stages before it's completed. Each stage is associated with a disposal task. To move through the various stages, close each task until you reach the last stage. After you complete the last task, the disposal order is complete. For more information about the disposal order stages, see disposal order stages.

Note: You can cancel a disposal order until it reaches the transit stage of the workflow. Once your disposal order is in the confirmation stage, you can't cancel that order. You can cancel a task that is in a draft, scheduling, or transit stage by selecting **Closed Incomplete** from the State list and closing the task.

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Inventory** > **Disposal orders**.
2. Select **New**.
   The Create New Enterprise Disposal Order page opens.
3. On the form, fill in the details.

Field	Description
Number	Reference number of the disposal order.
Stockroom	Stockroom where the asset is disposed from.
Location	Location of the stockroom where the asset gets disposed from. The location automatically appears after you select a stockroom. If you change the location and no location is associated with the selected stockroom, the stockroom field becomes empty. In this

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	scenario, you can select a stockroom from the stockroom list for a specified location.
Assigned to	Person responsible for disposing of the asset.
Stage	Current stage of the disposal order.
Vendor	Vendor that you want to dispose the asset to.

4. Select **Save**.
   The new disposal order is created and the disposal order workflow is triggered.
5. On the Pickup Details form, fill in the fields.

Pickup Details form

Field	Description
Scheduled date	Date when you want to dispose of the asset.
Pickup contact name	Name of the person from the vendor who will pick up the asset to dispose of.
Pickup details	Details of the pickup.
Additional info	Any message you want to add.

6. Open the **Disposable Assets** tab.
7. Select **Add** to select the assets that you want to dispose of.
8. Select the assets that you want to dispose of and select **Add**.
   Only assets that are in a non-terminal state appear in the list. A non-terminal state is any state in which the asset can transition into a different state.
   Under the **Enterprise Disposal Tasks** tab, a Verify Assets task is created.
9. Open the **Enterprise Disposal Tasks** tab and select the Verify Assets task.
10. In the Enterprise Disposal Tasks page, select the assets that you want to dispose of and select **Verify**.
    The state of the asset changes to In stock and the substate changes to Pending disposal.
11. Select **Close task**.

    Note: You cannot add additional assets to the disposal order after you complete and close the Verify Assets task.

    The draft stage is completed and the scheduling stage is in progress. The next task in the workflow, Schedule pickup, is automatically created and appears in the **Enterprise Disposal Tasks** tab.
12. Select the Schedule pickup task and in the **Vendor** and **Scheduled date** fields, enter the values that you want.
13. Select **Close Task**.
    The stage changes to transit and the Asset departure task is created.
14. Select the Asset departure task and in the **Vendor order ID** and **Pickup contact name** fields, enter the value that you want.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

15. Select the assets that you want to dispose of and in the **Actions on selected rows** picker, select **Depart**.
    The state of the asset changes to in transit and the substate changes to pending disposal.
16. Select **Close Task**.
    The stage changes to confirmation and the Vendor confirmation task is created.
17. Select the Vendor confirmation task and then select **Close Task**.
    The stage changes to documentation and a Disposal Documentation task is created.
18. Select the Disposal Documentation task and do the following:

    a. Select the Attach File icon to attach disposal documentation for the planned assets.

    b. Select the assets that you want to dispose of.

    > **Note:** If your disposal order contains any multi-component assets or pallet assets with children, the parent-child relationships within those assets are no longer applicable when you reach this task. Any changes that you make to a parent asset are no longer automatically applied to its child assets. You must individually select each asset that you want to dispose of, regardless of whether it is a parent or child asset.

    c. Select **Dispose**.
    The state of the asset changes to retired and the sub state changes to disposed.

    d. In the **Certificate of disposal** list, select **Yes**.

19. Select **Close Task**.
    All the enterprise disposal tasks are complete and the enterprise disposal order stage changes to completed.

Create a transfer order in Enterprise Asset Workspace

Create a transfer order in Enterprise Asset Management to transfer assets from one location to the other.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterptrise_asset_manager

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Inventory** > **Transfer orders**.
2. Select **New**.
   The Create New Transfer Order page opens.
3. On the form, fill in the details.

Field	Description
Number	Number of the transfer order.
Stage	Current stage of the transfer order.
From stockroom	The stockroom from which the asset is to be shipped.
To stockroom	The stockroom where the asset is to be shipped.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
From location	The location of the stockroom from where the asset is to be shipped.
To location	The location of the stockroom where the asset is to be shipped.
Requested date	The date the transfer order is created.
Delivery by date	
Drop Off	

4. Select **Save**.
   The transfer order is created and displays the **Transfer Order Lines** tab. You can now create transfer order lines to specify the items that the transfer order comprises of.

Create transfer order lines in Enterprise Asset Workspace

Create transfer order lines in Enterprise Asset Management to specify the items that comprise a transfer order.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterptrise_asset_manager

About this task

A transfer order can contain one or more transfer order lines. Under a single transfer order, all transfer order lines have the same **From location** and **To location**. Each line contains an asset to transfer and the quantity to transfer. The item to transfer is identified by the asset name and the model name. A transfer order line can involve one quantity of a non-consumable asset or multiple quantities of a consumable asset.

Procedure

1. Navigate to the transfer order in the Enterprise Asset Workspace.
2. In the transfer order, select the **Transfer Order Lines** tab
   The Transfer Order Lines page appears.
3. Select **New**.
4. On the form, fill in the details

Field	Description
Number	Internal unique number identifying the transfer order line.
Transfer Order	The transfer order to which the transfer order line belongs.
Model	Model of the items requested by the transfer order line. For example, a printer. If the Asset field is filled out first, the Model field is automatically filled in with the model corresponding to the asset.
Quantity requested	Number of items requested by the transfer order line. For example, 3 computers are requested to be transferred.
Quantity received	Number of items already received. For example, 3 keyboards are transferred, 2 are received.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Stage	Current stage of the transfer order. Transfer order lines can only be created when a transfer order is in **Draft** stage.
Request line	Requested item to associate with the transfer order line.
Asset	Asset requested by the transfer order line. For example, a specific printer. The asset can filter on stockrooms.
Quantity remaining	Number of items yet to be received. For example, 3 keyboards had been requested, 2 are received, 1 is remaining.
Quantity returned	Number of items that already needed to be returned.

5. Select **Save**.
   The Transfer Order Line is created and displays the **Transfer Order Line Tasks** tab. Transfer order line tasks are created to move transfer order lines from one stage to the other.

Close transfer order line tasks in Enterprise Asset Workspace

Close transfer order line tasks to move transfer order lines from one stage to the other.

Before you begin
Role required: admin

About this task
When you create a transfer order line, based on the model category specified in the asset, a transfer order line task is automatically created. Default template tasks are available with the Enterprise Asset Management application. The template tasks are based on model categories. Default template tasks cannot be deleted or modified.

When you create a transfer order line and select an asset, that asset corresponds to a model category. If a template task exists for that model category then that template task is added to the transfer order line as a transfer order line task.

Closing a transfer order line task completes the task and creates the next task in the process. For example, once you close the **Requested** task, the state for this task appears as Closed Complete and a new task is opened for the next stage, **Shipment Preparation**. This process continues till you close all the tasks required for completing the transfer order line. As you close a task and as a task moves from one stage to the next, the asset gets automatically updated too. For example, when the transfer order line moves from **Requested** to **Shipment Preparation**, the asset's status also moves from available to reserved.

Procedure

1. Navigate to a transfer order line record in the Enterprise Asset Workspace.
2. Select the **Transfer Order Line Tasks** tab.
   The following are the transfer order line tasks:
   - Requested:
   - Shipment Preparation
   - In Transit
   - Received
   - Delivered

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Open the Requested task.
4. Select **Close Task** to close this task.
   As you close the Requested task, the **Shipment Preparation** task which is the next task in the process is created.
5. Continue to open the next task in the process, till you close the **Delivered** task.
   Once you close the Delivered task, the transfer order line is completed.

Request a loaner asset in Enterprise Asset Workspace

Request a temporary or loaner asset or a consumable and use it for a specified period of time.

Before you begin

Role required: sys_admin

About this task

You can request a loner asset for yourself, for another employee of your organization, or for a third-party vendor. Before the asset is installed, you can cancel the loaner asset request at any time. You can submit a loaner order even if the product is not available at the moment in the location you want to select. In this case, your order is placed in queue.

While requesting a loaner asset, ensure that the start date is within three months from the date of submission and the end date is within six months from the start date.

Procedure

1. Navigate to **Service Catalog**.
2. Select the **Enterprise Asset Lifecycle** catalog.
   The sys _admin role needs to add the Enterprise Asset Lifecycle catalog. For more details, see Service Catalog documentation.
3. Select **Enterprise Asset Loaner Request**.
   The Enterprise Asset Loaner Request page opens.
4. On the form, fill in the fields.

Loaner Asset Request form

Field	Description
Requested for	Person for who you are requesting the asset. You can make a request for yourself, for another employee of your organization, or for a third-party vendor.
Requested for user	User for who you requested the asset. This field appears only when **For company user** is selected in the **Requested for** field.
Location	Location where the requested asset needs to be provided.
Model	Model of the asset that you are requesting.
Start date	Date when you want to start using the asset.
Return date	Date when you want to return the asset.
Justification	Reason why you need the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

After entering the **Start date** and **Return date**, if there are no loaner assets available in the selected location and for the selected time period, a warning appears. If you still submit the loaner order, your loaner order will be in a waitlist. For more information on waitlisted loaner orders, see Loaner asset reservation.

5. Select **Submit**.
   A message appears and shows whether your loaner order was placed successfully or the order was placed in a waitlist.

What to do next

To view your request, navigate to **Self-Service** > **My Requests**.

Before you receive your loaner asset, you can cancel the loaner asset request by selecting **Cancel**. After you receive your loaner asset, the **Cancel** button doesn't appear anymore. You can also return your loaner asset before the specified **Return date**.

Prepare, deploy, and reclaim loaner assets in Enterprise Asset Workspace

Select and prepare the loaner asset or consumable for deployment and reclamation by using loaner asset tasks. Deploy the loaner asset or consumable for a specific period of time, and reclaim it on the return date.

Before you begin

To use an asset as a loaner asset or consumable, go to the asset record and set the **Asset function** field to **Loaner**. These assets are reserved for use as loaner assets. You cannot use an asset that has the Asset function field set to anything other than **Loaner**.

The Loaner asset orders tab in the **Inventory** view shows all the loaner orders the asset has served in the past and at present. In case of consumables, if the consumable is not in a stockroom, it shows only the current loaner asset order that it's serving at present.

Role required: inventory_user

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Inventory** > **Loaner Asset Orders**.
2. Open an enterprise loaner asset order.
3. Select the **Loaner Asset tasks** tab.
4. Select the **Prepare** task and fill in the details.

Prepare task form

Fields	Descriptions
Asset	Asset that is used to fulfill the loaner asset request.
State	State of the task.
Assigned to	Person who is assigned the task of fulfilling the Deploy task.

5. After entering the necessary details, select **Close Task** to close the Prepare task.
   After the Prepare task is completed, a Deploy task is created under the Loaner Asset Tasks related list. On the Asset record [alm_asset] table, the following changes occur:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The state of the loaner asset changes to In stock.
- The **Reserved for** field is automatically set to the name of the user who the loaner asset was requested for.
- The substate changes to Pending install.

6. Open the Deploy task and fill in the details in the form.

Deploy task form

Fields	Descriptions
State	State of the task.
Assigned to	Person who is assigned the task of fulfilling the Deploy task.

7. Select **Close Task** to close the Deploy task.

   On the Asset record [alm_asset] table, the following changes occur:

   - The state of the loaner asset changes to In use.
   - The **Stock room** field changes to Null.
   - The **Assigned to** field is automatically set to the name of the user who the asset was requested for.
   - If you requested the loaner asset for a third-party vendor, then the **Managed by** field is automatically set to the name of the user who the asset was requested for.

   In case of consumable, state changes to Consumed.

   Two days before the return date, the users who opened or requested the asset will receive an email notification about the reclaim. One day before the return date, a Reclaim task is created under the Loaner Asset Tasks tab.

8. Open the Reclaim task.
9. On the form, fill in the details.

Reclaim task form

Field	Description
Stockroom	Stockroom where the returned asset will be stored. If you entered a stockroom different from where you received the loaner asset, then a warning message appears which says that the existing loaner orders from the initial stockroom might be affected.
Returned on	Actual date when the asset was returned.
State	State of the task.
Assigned to	Person who is assigned the task of fulfilling the Reclaim task.
Asset returned	Option to mark the asset as returned. The Reclaim task cannot be closed if the asset is not returned.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Asset functional	Functional status of the loaner asset after it's reclaimed.

If the asset is not functional, the state of the asset changes to In stock and substate changes to Pending repair.

10. To close the Reclaim task, select **Close Task**.
11. If a user returns the asset before the return date, do the following:
    a. Select **Reclaim**.
    b. On the Reclaim Asset form, update the fields.
    c. Close the Reclaim task.
    On the Asset record [alm_asset] table, the following changes occur:
    - The state of the loaner asset changes to In stock.
    - The substate changes to Available.
    - The **Stockroom** field is automatically set to the value that was selected on the Reclaim task form.
    - If the asset is assigned to a future loaner order, the substate changes to Reserved and reflects the details of the loaner order.

Requesting a Return Merchandise Authorization (RMA) for defective enterprise assets

A Return Merchandise Authorization (RMA) is an agreement between a buyer and a seller that allows the buyer to return, replace, or request the repair of a defective product within the specified warranty period. With the Enterprise Asset Management application, you can submit RMA orders to either replace or repair your defective enterprise assets.

Return Merchandise Authorization flow

When you submit an RMA order for your defective enterprise assets, the Enterprise Asset Management application automatically generates an RMA order line for each defective enterprise asset that was added to the order. You can then use these RMA order lines to track and manage the RMA process for each of those enterprise assets separately.

Note: You can submit RMA orders for serialized enterprise assets only.

For every RMA order line within an RMA order, you must complete a Prepare task to indicate how you want to proceed with the RMA process for the given enterprise asset. Based on the terms that you agreed upon with the asset vendor, you can choose to

- complete the RMA process on-site,
- complete the RMA process off-site with the asset vendor,
- or reject the RMA for the given enterprise asset.

If you choose to complete the RMA process on-site, the defective enterprise asset can only be repaired. You must complete all necessary on-site repair tasks to move the corresponding RMA order line to the Completed stage. If you choose to complete the RMA process off-site with the asset vendor, the defective enterprise asset can either be replaced or repaired. You must work with the asset vendor to complete all necessary off-site replacement or repair tasks so that you can move the corresponding RMA order line to the Completed stage. If you choose to reject the RMA, the RMA order line automatically moves to the Completed stage without requiring any further action. After every RMA order line within an RMA order reaches the Completed stage, the order is closed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Return Merchandise Authorization cancellations

If you have not completed the Prepare task for any of the RMA order lines within an RMA order, you can cancel the entire RMA order. After the order is canceled, all associated RMA order lines and tasks are also canceled.

Submit a Return Merchandise Authorization (RMA) order for your defective enterprise assets

Submit a Return Merchandise Authorization (RMA) order to initiate the replacement or repair of your defective enterprise assets.

Before you begin

Role required: asset or inventory_user

About this task

Note: You can submit RMA orders for serialized enterprise assets only.

Procedure

1. Navigate to **All** > **Service Catalog** > **Enterprise Asset Lifecycle**.
2. From the list of available Enterprise Asset Lifecycle catalog items, select **Enterprise RMA Order**.
3. In the Enterprise RMA Assets list on the Enterprise RMA Order form, select **Add**.
   The Add Row dialog box opens.
4. **Optional:** In the **Stockroom** field, search for and select the stockroom that the defective enterprise asset is located in.

   (Optional) By selecting a stockroom, you can narrow down the list of enterprise assets that you can search and select from in the **Enterprise asset** field (step 5).

   If you do not select a stockroom, this field populates automatically based on the enterprise asset that you select in the **Enterprise asset** field (step 5).
5. In the **Enterprise asset** field, search for and select the defective enterprise asset that you want to replace or repair through this RMA order.
6. Select **Add**.
   The dialog box closes and the defective enterprise asset is added to the list of Enterprise RMA Assets.
7. Repeat steps 3 to 6 for each defective enterprise asset that you want to replace or repair through this RMA order.

   Note: You can add up to 50 enterprise assets to a single RMA order.
8. Select **Submit**.

Result

After the RMA order is submitted successfully, you are automatically redirected to the Service Catalog home page. A confirmation message then appears with the RMA order number, which you can use to track and manage your RMA order.

Closing a Return Merchandise Authorization (RMA) order for your defective enterprise assets

After you submit a Return Merchandise Authorization (RMA) order for your defective enterprise assets, you must complete various tasks to close the order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You must complete the necessary set of tasks separately for each RMA order line within an RMA order. After you complete all necessary tasks for an RMA order line, it moves to the Completed stage. Once all RMA order lines within an RMA order reach the Completed stage, the RMA order is closed.

Complete the Prepare task for an RMA order line

Complete the Prepare task for an RMA order line so that you can proceed with replacing or repairing the given enterprise asset. Alternatively, you can reject the RMA to avoid taking any action on the given enterprise asset.

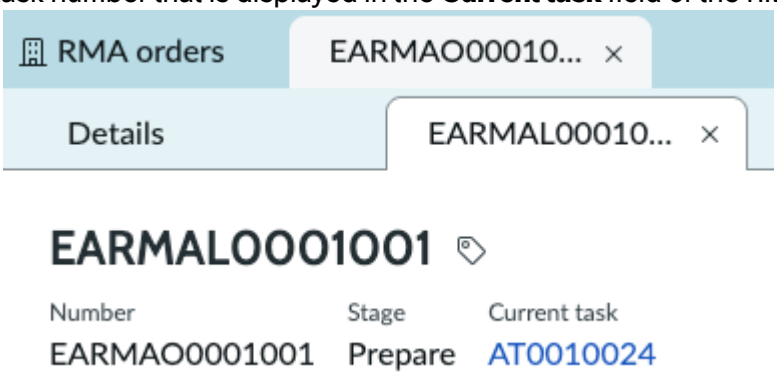
Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, navigate to the Inventory view.
2. Select the **RMA orders** tab.
3. From the list of available RMA orders, select the RMA order that you want to close.
   The RMA order record opens.
4. On the **RMA Order Lines** tab of the RMA order record, select the RMA order line of the enterprise asset that you want to replace, repair, or take no action on.
   The RMA order line record opens.
5. On the **RMA Line Tasks** tab of the RMA order line record, select the task number for the **Prepare** task.

   Alternatively, select the task number that is displayed in the **Current task** field of the RMA order line record header.

   The Prepare task opens.
6. On the **Details** tab of the Prepare task, fill in the fields.

Details tab

Field	Description
RMA Line Task Details	
Stockroom	Stockroom that the defective enterprise asset is located in. This field populates automatically.
Vendor	Vendor of the defective enterprise asset. This field populates automatically.
Vendor RMA number	RMA reference number provided by the asset vendor.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
RMA type	Option that indicates how you want to proceed with the RMA process for the defective enterprise asset. Select one of the following options: ○ **On-site**: Option to complete the RMA process on-site. With this option, you can repair the defective enterprise asset on-site. ○ **Off-site**: Option to complete the RMA process off-site with the asset vendor. With this option, the defective enterprise asset can be replaced or repaired off-site by the asset vendor. ○ **Reject**: Option to reject the RMA for the defective enterprise asset. With this option, you can avoid taking any action on the defective enterprise asset.
Short description	Brief description of the task.
Description	Detailed description of the task.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

7. Select **Close Task**.

Result
The Prepare task automatically closes with an updated state of Closed Complete.

What to do next
If you set the **RMA type** field to **On-site** or **Off-site**, complete all subsequent replacement or repair tasks to move the RMA order line to the **Completed** stage. If you set the **RMA type** field to **Reject**, the RMA order line automatically moves to the Completed stage, and no further action is required.

Complete the RMA process for a defective enterprise asset through an on-site repair

Perform all tasks that are required for an on-site repair so that you can complete the RMA process for a defective enterprise asset. You must perform this set of tasks separately for each defective enterprise asset that requires an on-site repair.

Before you begin
Before you can proceed with the RMA process for a defective enterprise asset on-site, you must complete the Prepare task for the associated RMA order line. See Complete the Prepare task for an RMA order line for detailed instructions.

Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

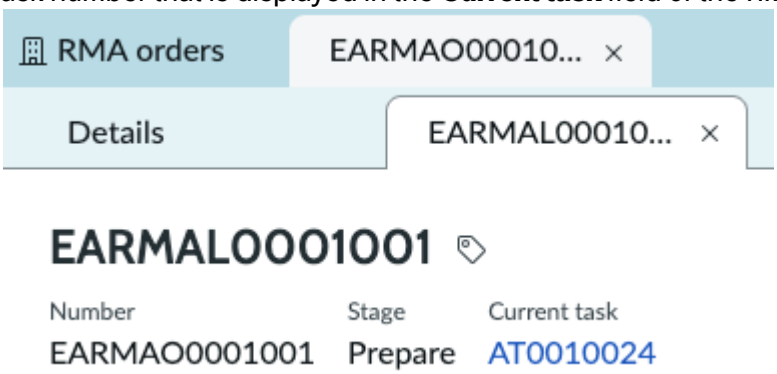
Procedure
1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **RMA orders** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. From the list of available RMA orders, select the RMA order that you want to close.
   The RMA order record opens.
4. On the **RMA Order Lines** tab of the RMA order record, select the RMA order line for the enterprise asset that you want to repair.
   The RMA order line record opens.
5. Complete and close the On-site repair task for the RMA order line.
   To successfully complete and close this task, you must either repair the defective enterprise asset on-site, move the RMA process off-site with the asset vendor, or reject the on-site repair request.

   a. On the **RMA Line Tasks** tab of the RMA order line record, select the task number for the **On-site repair** task.

   Alternatively, select the task number that is displayed in the **Current task** field of the RMA order line record header.



   The On-site repair task opens.

   b. On the **Details** tab of the On-site repair task, fill in the fields.

Details tab

Field	Description
RMA Line Task Details	
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
RMA decision	Action that you performed on the defective enterprise asset. Select one of the following options: ▪ **Repair**: Option indicating that you successfully repaired the defective enterprise asset on-site. ▪ **Off-site**: Option indicating that you are moving the RMA process off-site with the asset vendor. Select this option if you are unable to repair the defective enterprise asset on-site. ▪ **Reject**: Option indicating that you rejected the on-site repair request.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Short description	Brief description of the task.
Description	Detailed description of the task.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.

The On-site repair task automatically closes with an updated state of Closed Complete.

If you set the **RMA decision** field to **Off-site**, proceed to Complete the RMA process for a defective enterprise asset through an off-site replacement or repair to continue with the RMA process off-site.

Result

If you successfully repaired the defective enterprise asset, the RMA order line moves to the Completed stage. In the corresponding asset record, the **State** field changes to **In stock** and the **Substate** field changes to **Available**.

If you moved the RMA process off-site, a Shipment task automatically populates on the **RMA Line Tasks** tab of the RMA order line. You must then ship the defective enterprise asset back to the asset vendor so that they can complete the remaining replacement or repair tasks off-site. See Complete the RMA process for a defective enterprise asset through an off-site replacement or repair for detailed instructions on how to replace or repair a defective enterprise asset off-site.

If you rejected the on-site repair request, the RMA order line moves to the Completed stage. However, the defective enterprise asset remains in the In stock state and Pending repair substate. You must submit a new RMA order to take additional action on the asset.

What to do next

Complete the RMA process for any remaining RMA order lines within the RMA order. After all RMA order lines reach the Completed stage, the RMA order is closed.

Complete the RMA process for a defective enterprise asset through an off-site replacement or repair

Work with your asset vendor to perform all tasks that are required for an off-site replacement or repair so that you can complete the RMA process for a defective enterprise asset. You must perform this set of tasks separately for each defective enterprise asset that requires an off-site replacement or repair.

Before you begin

Before you can proceed with the RMA process for a defective enterprise asset off-site, you must complete the Prepare task for the associated RMA order line. See Complete the Prepare task for an RMA order line for detailed instructions.

Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

Procedure

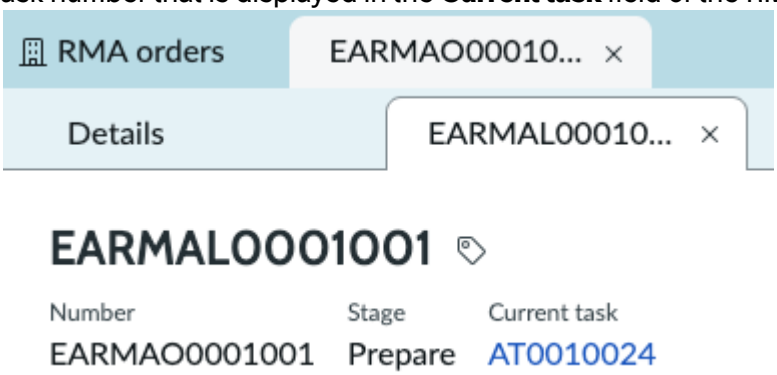
1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **RMA orders** tab.
3. From the list of available RMA orders, select the RMA order that you want to close.
   The RMA order record opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. On the **RMA Order Lines** tab of the RMA order record, select the RMA order line for the enterprise asset that you want to replace or repair.
   The RMA order line record opens.
5. Complete and close the Shipment task for the RMA order line.
   To successfully complete and close this task, you must ship the defective enterprise asset back to the asset vendor.

   a. On the **RMA Line Tasks** tab of the RMA order line record, select the task number for the **Shipment** task.

   Alternatively, select the task number that is displayed in the **Current task** field of the RMA order line record header.



   The Shipment task opens.

   b. On the **Details** tab of the Shipment task, fill in the fields.

Details tab

Field	Description
RMA Line Task Details	
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Shipment	
Carrier	Shipping carrier through which you shipped the defective enterprise asset.
Ship date	Date on which you shipped the defective enterprise asset.
Tracking number	Tracking number that enables you to track the status and location of the shipment.
Notes	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Work notes	Notes about the task that are visible to all users within your organization.

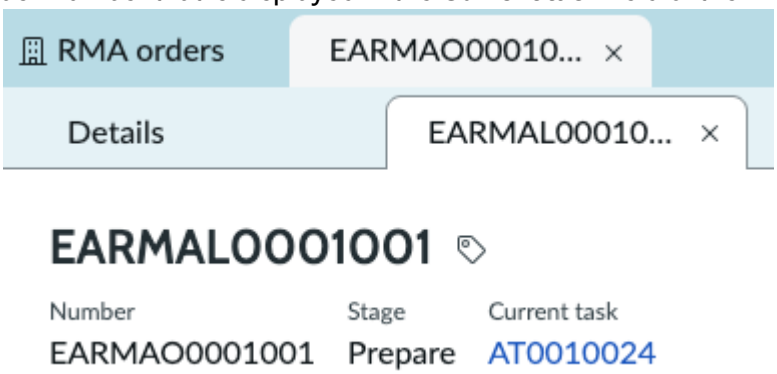
c. Select **Close Task**.

The Shipment task automatically closes with an updated state of Closed Complete.

6. Complete and close the Vendor RMA decision task for the RMA order line.
To successfully complete and close this task, the asset vendor must either repair the defective enterprise asset, replace the defective enterprise asset with a new asset, or reject the RMA.

a. On the **RMA Line Tasks** tab of the RMA order line record, select the task number for the **Vendor RMA decision** task.

Alternatively, select the task number that is displayed in the **Current task** field of the RMA order line record header.



The Vendor RMA decision task opens.

b. On the **Details** tab of the Vendor RMA decision task, fill in the fields.

Details tab

Field	Description
RMA Line Task Details	
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
RMA decision	Action that the asset vendor performed on the defective enterprise asset. Select one of the following options: ▪ **Repair**: Option indicating that the asset vendor successfully repaired the defective enterprise asset. ▪ **Replace**: Option indicating that the asset vendor is replacing the defective enterprise asset with a new functioning asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	▪ **Reject**: Option indicating that the asset vendor rejected the RMA for the defective enterprise asset. If you select this option, the **Reject reason** field appears below the **RMA decision** field. In the **Reject reason** field, specify why the asset vendor rejected the RMA.
Short description	Brief description of the task.
Description	Detailed description of the task.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.

The Vendor RMA decision task automatically closes with an updated state of Closed Complete.

7. Complete and close the Receive task for the RMA order line.

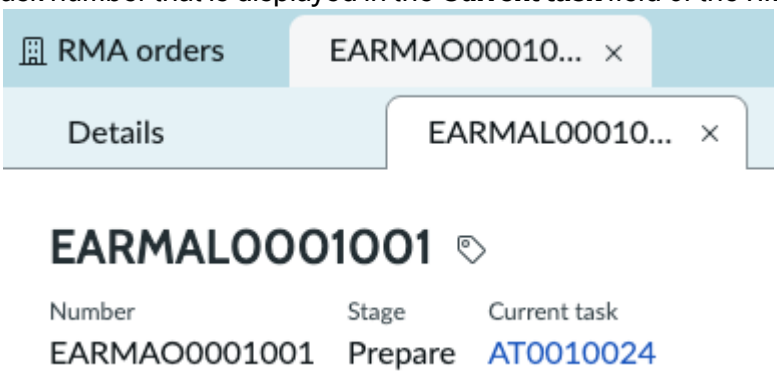
To successfully complete and close this task, you must receive the new, repaired, or rejected enterprise asset from the asset vendor.

If you are receiving a new enterprise asset as a replacement for the defective enterprise asset, you must also create an asset record for the new enterprise asset. See Create enterprise assets for detailed instructions.

Note: When you create the asset record for the new enterprise asset, you must set the **State** field to **In stock**. You must also verify that the **Acquisition method** field is set to **RMA Replacement.**

a. On the **RMA Line Tasks** tab of the RMA order line record, select the task number for the **Receive** task.

Alternatively, select the task number that is displayed in the **Current task** field of the RMA order line record header.



The Receive task opens.

b. On the **Details** tab of the Receive task, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details tab

Field	Description
RMA Line Task Details	
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Receive	
Asset received	Option that indicates if you received the new, repaired, or rejected enterprise asset from the asset vendor. To complete and close the Receive task, you must set this field to **Yes**.
Replacement asset stockroom **Note:** This field appears only if the asset vendor replaced the defective enterprise asset with a new one.	Stockroom that the new enterprise asset is located in.
Replacement asset **Note:** This field appears only if the asset vendor replaced the defective enterprise asset with a new one.	New enterprise asset that has replaced the defective enterprise asset.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.

The Receive task automatically closes with an updated state of Closed Complete.

Result

The RMA order line moves to the **Completed** stage.

If the asset vendor successfully replaced the defective enterprise asset with a new one, the **Details** tab of the RMA order line automatically updates with information about the new enterprise asset, including the name, model, and stockroom of the asset. In addition, the Enterprise Asset Management application automatically retires the defective enterprise asset, triggering the **State** and **Substate** fields to change to **Retired** and **Vendor credit** in the corresponding asset record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If the asset vendor successfully repaired the defective enterprise asset, the **State** and **Substate** fields change to **In stock** and **Available** in the corresponding asset record.

If the asset vendor rejected the RMA, the defective enterprise asset remains in the In stock state and Pending repair substate. You must submit a new RMA order to take additional action on the asset.

What to do next

Complete the RMA process for any remaining RMA order lines within the RMA order. After all RMA order lines reach the Completed stage, the RMA order is closed.

Managing recalled enterprise assets

You can track and take action on enterprise assets that have been recalled by the asset vendor by using recall orders. You can choose to replace, repair, or retire your recalled enterprise assets. Alternatively, you can choose to provide your users with additional instructions on how to operate your recalled enterprise assets.

Recall flow

When you submit a recall order, the Enterprise Asset Management application automatically generates an enterprise recalled asset record for each enterprise asset that you included in the order. You can then use these records to track and manage the recall process for each of those enterprise assets.

Within each recall order, you must indicate how you are going to proceed with the recall process for the given enterprise asset based on the remediation option that is recommended by the asset vendor in the corresponding recall notification. You can choose to

- repair the enterprise asset either on-site or off-site,
- replace the enterprise asset with a new asset,
- retire the enterprise asset,
- or provide additional instructions on how to operate the enterprise asset.

Based on the option that you choose, you must complete all subsequent tasks to remediate the asset and move the corresponding enterprise recalled asset record to the Completed stage. After every enterprise recalled asset record within a recall order reaches the Completed stage, the recall order is marked as complete.

Submit a recall order for your enterprise assets

Submit a recall order to initiate the replacement, repair, or retirement of enterprise assets that have been recalled by the asset vendor. You can also choose to provide your users with additional instructions on how to operate your recalled enterprise assets.

Before you begin

Role required: sn_eam.enterprise_asset_manager

About this task

Note: You can include multiple enterprise assets in a single recall order. However, all enterprise assets must be associated with the same model.

Procedure

1. From the Enterprise Asset Workspace, open the Inventory view.
2. On the **Recall orders** tab, select **New**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the Create New Enterprise Recall Order form, fill in the fields.

Create New Enterprise Recall Order form

Field	Description
Recall source	Source of the enterprise asset recall.
Remediation	Action that you are going to take on the recalled enterprise assets, based on the remediation option that is recommended by the asset vendor in the corresponding recall notification. Select one of the following options: ○ **Repair**: Option to repair the recalled enterprise assets. ○ **Replace**: Option to replace the recalled enterprise assets with new assets. ○ **Retire**: Option to retire the recalled enterprise assets. ○ **Notation**: Option to provide users with additional instructions on how to operate the recalled enterprise assets. If you select this option, the **Recall remediation instruction** field appears below the **Serial numbers** field. In the **Recall remediation instruction** field, enter the additional instructions.
Models	Models that the recalled enterprise assets are associated with. You can select one or more models from the list.
Serial numbers	Serial numbers that identify each recalled enterprise asset. This field is optional. To include multiple enterprise assets in this recall order, enter all associated serial numbers using one of the following options: ○ Serial number range, such as `SN001 - SN010` ○ Comma-separated list of individual serial numbers, such as `SN020, SN038, SN054` ○ Comma-separated list of both serial number ranges and individual serial numbers, such as `SN001 - SN010, SN202, SN038, SN100 - SN110` If you do not enter any serial numbers, all enterprise assets that are associated with the model specified in the **Model** field are included in this recall order. **Note:** If you specify any serial numbers on a recall order, you cannot specify any vehicle identification numbers (VINs) on the same order.
Location	Location in which the recalled enterprise assets reside.
Recall notice number	Identification number of the recall notification that was sent by the asset vendor.
Remediate by	Date by which the action that you selected in the **Remediation** field must be completed.
VINs	Vehicle identification numbers (VINs) that identify each recalled enterprise asset. This field is optional and applicable only to automotive enterprise assets, such as cars and mopeds.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	To include multiple automotive enterprise assets in this recall order, enter all associated VINs using one of the following options: ○ VIN range, such as `3VWSB81H8WM210368 - 3VWSB81H8WM210370` ○ Comma-separated list of individual VINs, such as `1B7HF13ZX1J572139, JH4KA8150MC012098` ○ Comma-separated list of both VIN ranges and individual VINs, such as `4JGAB54E81A277648 - 4JGAB54E81A277650, 1GNDX03E03D188446, KM8SC73E94U774838` If you do not enter any VINs, all enterprise assets that are associated with the model specified in the **Model** field are included in this recall order. **Note:** If you specify any VINs on a recall order, you cannot specify any serial numbers on the same order.
Include child locations	Option to include the child locations of the location that you specified in the **Location** field.
Additional info	Additional information about the recall order.

4. Select **Save**.

Result

- The **Acknowledge Recall** button appears.
- The **Recalled Assets** and **Recalled Tasks** tabs are shown.

What to do next

Acknowledge enterprise assets in the recall order.

Acknowledge enterprise assets in the recall order

Review and confirm the enterprise assets included in the recall order to proceed with the recall process.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Recall orders** tab.
3. Select the recall order that you want to acknowledge.
4. Select **Acknowledge Recall**
   An Acknowledge task in the Open state is created and listed under the Recall Tasks tab.
5. Select the acknowledge task.
6. Verify the recall order details and assets listed under the **Recall Assets** tab.
7. Select **Close task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The State of the Acknowledge task changes from **Open** to **Closed Complete**.
- The Stage of the recall order changes to **Acknowledged**.
- The **Begin recall process** button appears.

What to do next

Select **Begin recall process** to proceed with the recall process for the specified enterprise assets. For details, see Completing a recall order for your enterprise assets.

Completing a recall order for your enterprise assets

After you submit a recall order for any enterprise assets that have been recalled by the asset vendor, you must perform various tasks to complete the order.

You can either complete the required set of tasks separately for each of your recalled enterprise assets or bulk update and complete the required set of tasks for all recalled enterprise assets that share the same task name, state, assignment group, and assigned user. After you complete all required tasks for a recalled enterprise asset, the corresponding enterprise recalled asset record moves to the Completed stage. Once all enterprise recalled asset records within a recall order reach the Completed stage, the recall order is completed.

Complete the Prepare task for a recalled enterprise asset

Complete the Prepare task for a recalled enterprise asset so that you can proceed with replacing, repairing, or retiring the given enterprise asset.

Before you begin

Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

About this task

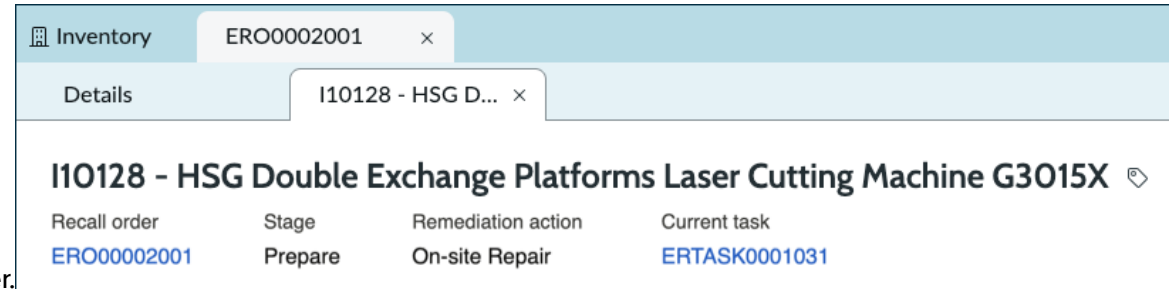
Important: The Prepare task is applicable only to recall orders in which the **Remediation** field set to **Repair**, **Replace**, or **Retire**. If the **Remediation** field is set to **Notation**, you can proceed directly to the Notation task instead. See Complete the Notation task for a recalled enterprise asset for more information on the Notation task.

Procedure

1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **Recall orders** tab.
3. From the list of available recall orders, select the recall order that you want to complete.
   The recall order record opens.
4. On the **Recalled Assets** tab of the recall order record, select the enterprise asset that you want to replace, repair, or retire.
   The recalled asset record opens.
5. On the **Recall Tasks** tab, select the task number for the **Prepare** task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



The Prepare task opens.

6. On the **Details** tab of the Prepare task, fill in the fields.

Details tab

Field	Description
Recall task details	
Stockroom	Stockroom of the recalled enterprise asset. **Note:** This field is editable only under the following conditions: ○ The **Remediation** field in the associated recall order is set to **Repair**. In addition, the **Remediation action** field in this Prepare task is set to **Off-site Repair**. ○ The **Remediation** field in the associated recall order is set to **Retire**. **Important:** If the recalled enterprise asset has not already been moved to a stockroom, you must move it to an available stockroom before you can proceed with the asset retirement or off-site repair.
Remediation action	Option that indicates how you want to proceed with the recall process for the enterprise asset. **Note:** This field is editable only if the **Remediation** field in the associated recall order is set to **Repair**.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which you plan to complete this task.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

7. Close the Prepare task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can either close the Prepare task for only the specified enterprise asset or bulk update and close the Prepare task for multiple enterprise assets.

If you want to close the Prepare task for only the specified enterprise asset, select **Close Task**.

If you want to bulk update and close the Prepare task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the Prepare task for. Select **Close Task** to close the dialog box and return to the Prepare task.

Important: You can bulk update the Prepare task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

Result

The Prepare task automatically reloads with an updated state of Closed Complete.

If you are proceeding with an on-site repair, enterprise assets with a state of In use are updated with a state of In maintenance. In addition, enterprise assets with a state of In Stock are updated with a substate of Pending repair.

If you are proceeding with an off-site repair, enterprise assets with a state of either In use or In maintenance are updated with a state of In stock and a substate of Pending repair.

If you are proceeding with an asset replacement, enterprise assets with a state of In use are updated with a state of In maintenance. In addition, enterprise assets with a state of In stock are updated with a substate of Pending repair.

If you are proceeding with an asset retirement, enterprise assets are updated with a state of In stock and substate of Pending disposal.

What to do next

Complete all subsequent replacement, repair, or retirement tasks.

Complete the Notation task for a recalled enterprise asset

Complete the Notation task for a recalled enterprise asset so that you can provide your users with additional instructions on how to operate the asset.

Before you begin

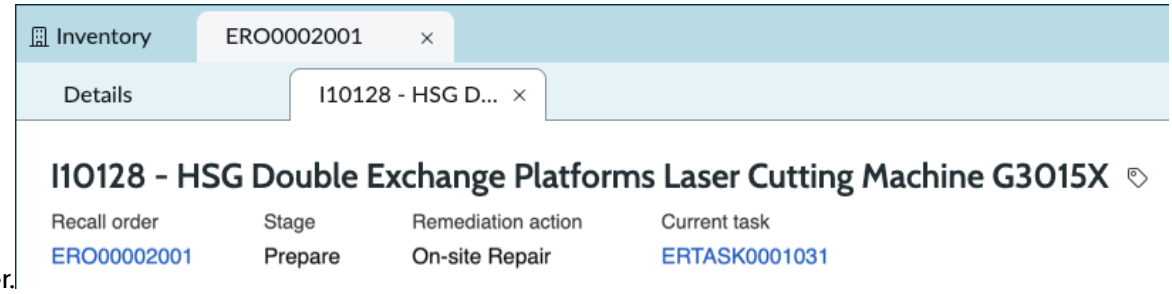
Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **Recall orders** tab.
3. From the list of available recall orders, select the recall order that you want to complete.
   The recall order record opens.
4. On the **Recalled Assets** tab of the recall order record, select the enterprise asset that you want to provide additional operating instructions for.
   The recalled asset record opens.
5. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **Notation** task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



The Notation task opens.

6. Close the Notation task.

   You can either close the Notation task for only the specified enterprise asset or bulk update and close the Notation task for multiple enterprise assets.

   If you want to close the Notation task for only the specified enterprise asset, select **Close Task**.

   If you want to bulk update and close the Notation task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the Notation task for. Select **Close Task** to close the dialog box and return to the Notation task.

   Important: You can bulk update the Notation task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

Result
The recalled asset record moves to the Completed stage.

What to do next
Complete the recall process for all remaining enterprise assets that are included in the recall order. After all corresponding recalled asset records reach the Completed stage, the state of the recall order changes to Completed.

Complete the recall process for an enterprise asset through an on-site repair

Perform all tasks that are required for an on-site repair so that you can complete the recall process for an enterprise asset that has been recalled by the asset vendor.

Before you begin
Before you can proceed with repairing a recalled enterprise asset on-site, you must complete the Prepare task for that asset. See Complete the Prepare task for a recalled enterprise asset for detailed instructions.

Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

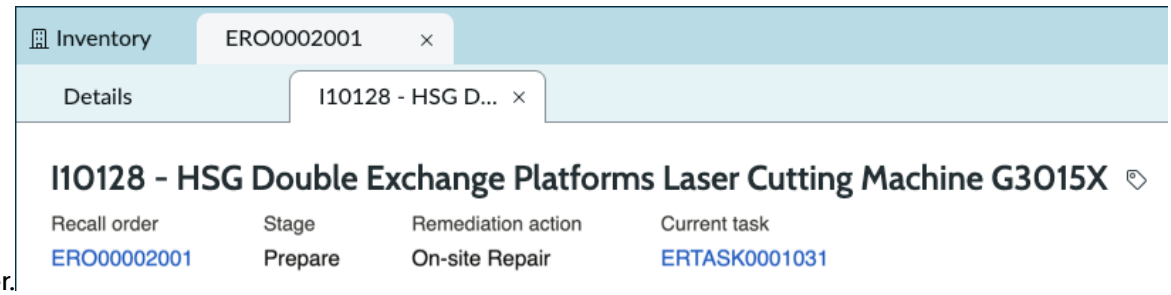
Procedure
1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **Recall orders** tab.
3. From the list of available recall orders, select the recall order that you want to complete.
   The recall order record opens.
4. On the **Recalled Assets** tab of the recall order record, select the enterprise asset that you want to repair.
   The recalled asset record opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Complete and close the On-site Repair task for the recalled enterprise asset.
   To successfully complete and close this task, you must repair the recalled enterprise asset on-site.

   a. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **On-site Repair** task.

      Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



      The On-site Repair task opens.

   b. On the **Details** tab of the On-site Repair task, fill in the fields.

Details tab

Field	Description
Recall task details	
Remediation action	Option that indicates how you want to proceed with the recall process for the enterprise asset. This field is automatically set to **On-site Repair**.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which you plan to perform the on-site repair.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

   c. Close the On-site Repair task.

      You can either close the On-site Repair task for only the specified enterprise asset or bulk update and close the On-site Repair task for multiple enterprise assets.

      If you want to close the On-site Repair task for only the specified enterprise asset, select **Close Task**.

      If you want to bulk update and close the On-site Repair task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

On-site Repair task for. Select **Close Task** to close the dialog box and return to the On-site Repair task.

Important: You can bulk update the On-site Repair task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

The On-site Repair task automatically reloads with an updated state of Closed Complete.

Result

The recalled asset record moves to the Completed stage. In addition, the state and substate fields change to In stock and Available in the corresponding asset record.

What to do next

Complete the recall process for all remaining enterprise assets that are included in the recall order. After all corresponding recalled asset records reach the Completed stage, the state of the recall order changes to Completed.

Complete the recall process for an enterprise asset through an off-site repair

Work with your asset vendor to perform all tasks that are required for an off-site repair so that you can complete the recall process for an enterprise asset that has been recalled by the vendor.

Before you begin

Before you can proceed with repairing a recalled enterprise asset off-site, you must complete the Prepare task for that asset. See Complete the Prepare task for a recalled enterprise asset for detailed instructions.

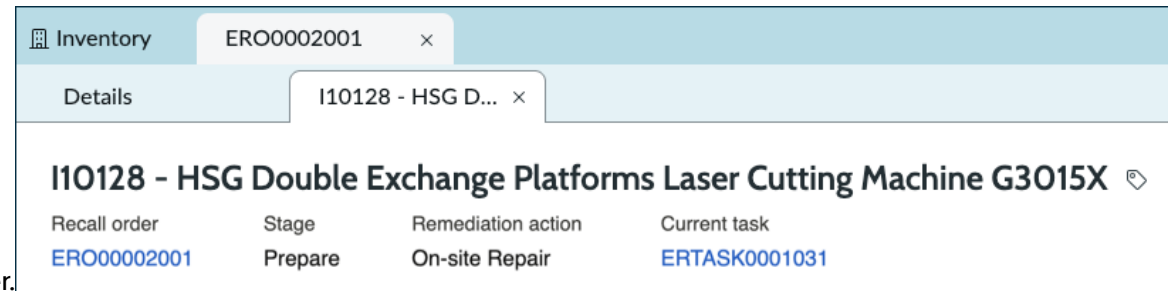
Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **Recall orders** tab.
3. From the list of available recall orders, select the recall order that you want to complete.
   The recall order record opens.
4. On the **Recalled Assets** tab of the recall order record, select the enterprise asset that you want to repair.
   The recalled asset record opens.
5. Complete and close the Shipment task for the recalled enterprise asset.
   To successfully complete and close this task, you must ship the recalled enterprise asset to the asset vendor.

   a. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **Shipment** task.

   Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Shipment task opens.

b. On the **Details** tab of the Shipment task, fill in the fields.

Details tab

Field	Description
Recall task details	
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which you plan to ship the recalled enterprise asset to the asset vendor.
Shipment	
Carrier	Shipping carrier through which you shipped the recalled enterprise asset.
Ship date	Date on which you shipped the recalled enterprise asset.
Tracking number	Tracking number that enables you to track the status and location of the shipment.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Close the Shipment task.

You can either close the Shipment task for only the specified enterprise asset or bulk update and close the Shipment task for multiple enterprise assets.

If you want to close the Shipment task for only the specified enterprise asset, select **Close Task**.

If you want to bulk update and close the Shipment task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the Shipment task for. Select **Close Task** to close the dialog box and return to the Off-site Repair task.

Important: You can bulk update the Shipment task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

The Shipment task automatically reloads with an updated state of Closed Complete.

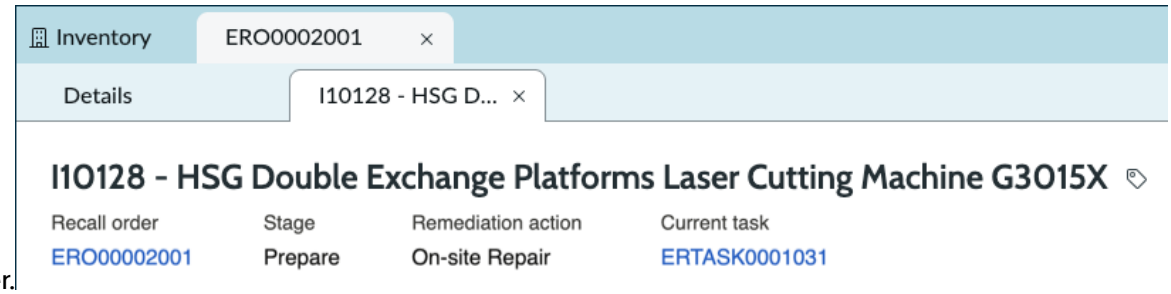
d. Close the Shipment task to return to the recalled asset record.

6. Complete and close the Off-site Repair task for the recalled enterprise asset.
To successfully complete and close this task, the asset vendor must repair the recalled enterprise asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **Off-site Repair** task.

Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



The Off-site Repair task opens.

b. On the **Details** tab of the Off-site Repair task, fill in the fields.

Details tab

Field	Description
Recall task details	
Remediation action	Option that indicates how you want to proceed with the recall process for the enterprise asset. This field is automatically set to **Off-site Repair**.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which the asset vendor plans to perform the off-site repair.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Close the Off-site Repair task.

You can either close the Off-site Repair task for only the specified enterprise asset or bulk update and close the Off-site Repair task for multiple enterprise assets.

If you want to close the Off-site Repair task for only the specified enterprise asset, select **Close Task**.

If you want to bulk update and close the Off-site Repair task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the Off-site Repair task for. Select **Close Task** to close the dialog box and return to the Off-site Repair task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You can bulk update the Off-site Repair task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

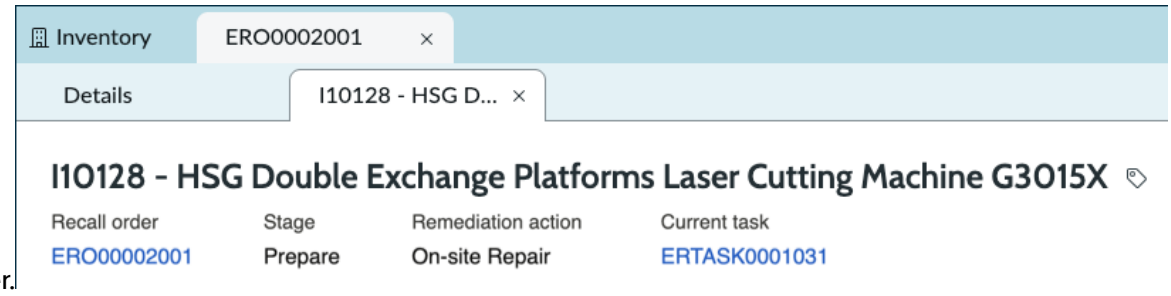
The Off-site Repair task automatically reloads with an updated state of Closed Complete.

d. Close the Off-site Repair task to return to the recalled asset record.

7. Complete and close the Receive task for the recalled enterprise asset.
To successfully complete and close this task, you must receive the repaired enterprise asset from the asset vendor.

a. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **Receive** task.

Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



The Receive task opens.

b. On the **Details** tab of the Receive task, fill in the fields.

Details tab

Field	Description
Recall task details	
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which you plan to receive the repaired enterprise asset.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Close the Receive task.

You can either close the Receive task for only the specified enterprise asset or bulk update and close the Receive task for multiple enterprise assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you want to close the Receive task for only the specified enterprise asset, select **Close Task**.

If you want to bulk update and close the Receive task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the Receive task for. Select **Close Task** to close the dialog box and return to the Receive task.

Important: You can bulk update the Receive task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

The Receive task automatically reloads with an updated state of Closed Complete.

Result

The recalled asset record moves to the Completed stage. In addition, the state and substate fields change to In stock and Available in the corresponding asset record.

What to do next

Complete the recall process for all remaining enterprise assets that are included in the recall order. After all corresponding recalled asset records reach the Completed stage, the state of the recall order changes to Completed.

Complete the recall process for an enterprise asset through an asset replacement

Work with your asset vendor to perform all tasks that are required for an asset replacement so that you can complete the recall process for an enterprise asset that has been recalled by the vendor.

Before you begin

Before you can proceed with replacing a recalled enterprise asset, you must complete the Prepare task for that asset. See Complete the Prepare task for a recalled enterprise asset for detailed instructions.

Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

Procedure

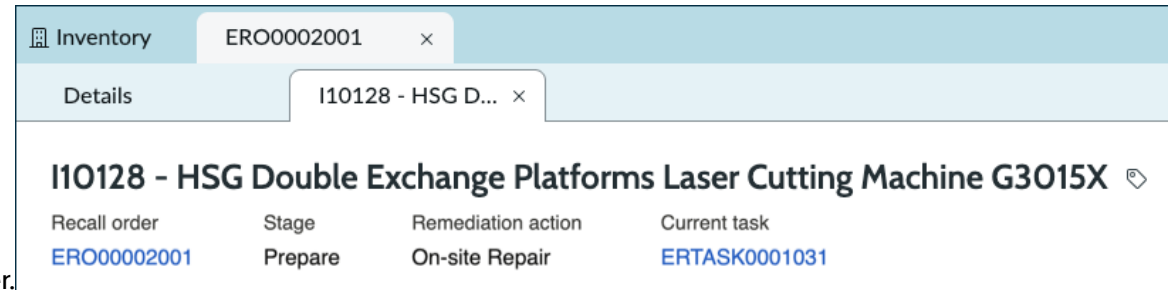
1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **Recall orders** tab.
3. From the list of available recall orders, select the recall order that you want to complete.
   The recall order record opens.
4. On the **Recalled Assets** tab of the recall order record, select the enterprise asset that you want to replace.
   The recalled asset record opens.
5. Complete and close the Receive New task for the recalled enterprise asset.
   To successfully complete and close this task, you must receive the new enterprise asset from the asset vendor. In addition, you must create an asset record for the new enterprise asset. See Create enterprise assets for detailed instructions.

   Note: When you create the asset record for the new enterprise asset, you must set the **State** field to **In stock**. You must also verify that the **Acquisition method** field is set to **Recall Replacement.**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **Receive New** task.

Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



The Receive New task opens.

b. On the **Details** tab of the Receive New task, fill in the fields.

Details tab

Field	Description
Recall task details	
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which you plan to receive the new enterprise asset.
Replacement asset	
Replacement asset	New enterprise asset that is replacing the recalled enterprise asset.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.
The Receive New task automatically reloads with an updated state of Closed Complete.

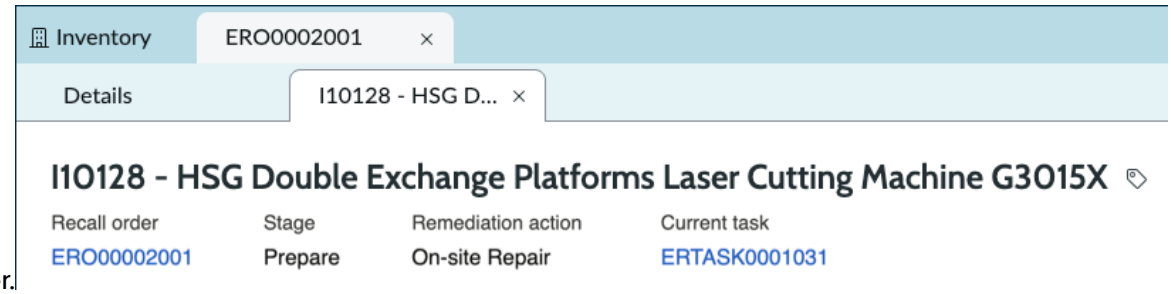
d. Close the Receive New task to return to the recalled asset record.

6. Complete and close the Replace task for the recalled enterprise asset.
To successfully complete and close this task, you must replace the recalled enterprise asset with the new asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **Replace** task.

Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



The Replace task opens.

b. On the **Details** tab of the Replace task, fill in the fields.

Details tab

Field	Description
Recall task details	
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which you plan to replace the recalled enterprise asset with the new asset.
Replacement asset	
Replacement asset	New asset that has replaced the recalled enterprise asset.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Close the Replace task.

You can either close the Replace task for only the specified enterprise asset or bulk update and close the Replace task for multiple enterprise assets.

If you want to close the Replace task for only the specified enterprise asset, select **Close Task**.

If you want to bulk update and close the Replace task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the Replace task for. Select **Close Task** to close the dialog box and return to the Replace task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: You can bulk update the Replace task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

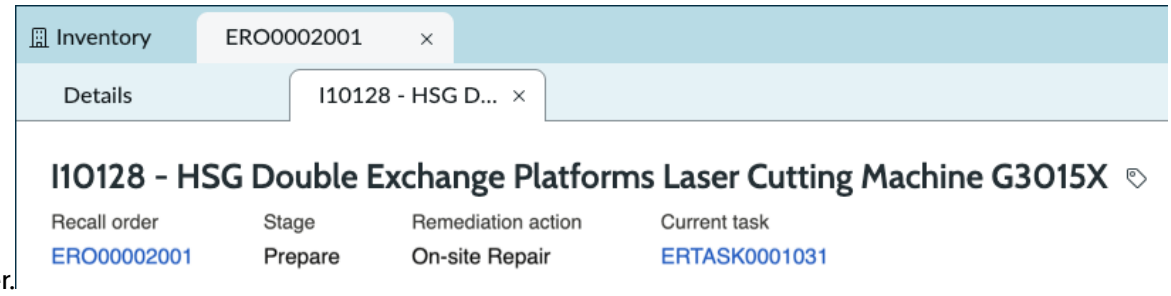
The Replace task automatically reloads with an updated state of Closed Complete.

d. Close the Replace task to return to the recalled asset record.

7. Complete and close the Ship Old task for the recalled enterprise asset.
To successfully complete and close this task, you must ship the recalled enterprise asset back to the asset vendor.

a. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **Ship Old** task.

Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



The Ship Old task opens.

b. On the **Details** tab of the Ship Old task, fill in the fields.

Details tab

Field	Description
Recall task details	
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which you plan to ship the recalled enterprise asset back to the asset vendor.
Shipment	
Carrier	Shipping carrier through which you shipped the recalled enterprise asset.
Ship date	Date on which you shipped the recalled enterprise asset.
Tracking number	Tracking number that enables you to track the status and location of the shipment.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Close the Ship Old task.

You can either close the Ship Old task for only the specified enterprise asset or bulk update and close the Ship Old task for multiple enterprise assets.

If you want to close the Ship Old task for only the specified enterprise asset, select **Close Task**.

If you want to bulk update and close the Ship Old task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the Ship Old task for. Select **Close Task** to close the dialog box and return to the Ship Old task.

Important: You can bulk update the Ship Old task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

The Ship Old task automatically reloads with an updated state of Closed Complete.

Result

The recalled asset record moves to the Completed stage. The Enterprise Asset Management application then automatically retires the recalled enterprise asset, triggering the state and substate fields to change to Retired and Vendor credit in the corresponding asset record.

What to do next

Complete the recall process for all remaining enterprise assets that are included in the recall order. After all corresponding recalled asset records reach the Completed stage, the state of the recall order changes to Completed.

Complete the recall process for an enterprise asset through an asset retirement

Perform all tasks that are required for an asset retirement so that you can complete the recall process for an enterprise asset that has been recalled by the asset vendor.

Before you begin

Before you can proceed with retiring a recalled enterprise asset, you must complete the Prepare task for that asset. See Complete the Prepare task for a recalled enterprise asset for detailed instructions.

Role required: sn_eam.enterprise_asset_manager or enterprise_asset_technician

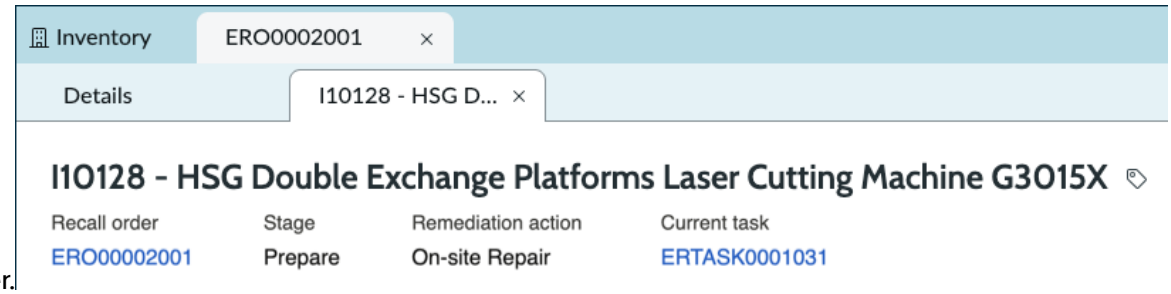
Procedure

1. From the Enterprise Asset Workspace, open the Inventory view.
2. Select the **Recall orders** tab.
3. From the list of available recall orders, select the recall order that you want to complete.
   The recall order record opens.
4. On the **Recalled Assets** tab of the recall order record, select the enterprise asset that you want to retire.
   The recalled asset record opens.
5. Complete and close the Retire task for the recalled enterprise asset.
   To successfully complete and close this task, you must retire and move the recalled enterprise asset to an available stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the **Recall Tasks** tab of the recalled asset record, select the task number for the **Retire** task.

Alternatively, select the task number that is displayed in the **Current task** field of the recalled asset record header.



The Retire task opens.

b. On the **Details** tab of the Retire task, fill in the fields.

Details tab

Field	Description
Recall task details	
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Scheduled date	Date and time at which you plan to retire the enterprise asset.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

c. Close the Retire task.

You can either close the Retire task for only the specified enterprise asset or bulk update and close the Retire task for multiple enterprise assets.

If you want to close the Retire task for only the specified enterprise asset, select **Close Task**.

If you want to bulk update and close the Retire task for multiple enterprise assets, select **Include more assets**. When the Select assets for bulk update dialog box opens, select the check box for each enterprise asset that you want to bulk update and close the Retire task for. Select **Close Task** to close the dialog box and return to the Retire task.

Important: You can bulk update the Retire task only for enterprise assets that have the same task name, state, assignment group, and assigned to user.

The Retire task automatically reloads with an updated state of Closed Complete.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The recalled asset record moves to the Completed stage. In addition, the state and substate fields change to Retired and Pending disposal in the corresponding asset record.

What to do next
Complete the asset retirement by disposing of the recalled enterprise asset using a disposal order. See Create a disposal order in the Enterprise Asset Workspace for detailed instructions.

After you successfully dispose of the recalled enterprise asset, you can complete the recall process for all remaining enterprise assets that are included in the recall order. After all corresponding recalled asset records reach the Completed stage, the state of the recall order changes to Completed.

Close an enterprise asset reclamation request

Close an asset reclamation request to efficiently reclaim enterprise assets when an employee leaves an organization or moves to a different role.

Before you begin
For each reclaimed asset, an Enterprise Asset Reclamation Line is created. You must close all the tasks of a Enterprise Asset Reclamation Line to close the Enterprise Asset Reclamation Line. Once all Enterprise Asset Reclamation Lines are closed, the Asset Reclamation Request is closed.

Role required: sn_eam.enterprise_asset_manager or sn_eam.enterprise_asset_technician

Procedure
1. Navigate to **Enterprise Asset Workspace** > **Inventory** > **Reclamation requests**.
2. In the Asset reclamation requests page, open the request that you want to fulfill and select the Enterprise Asset Reclamation Lines related list.

   Based on what reclaim method the user selected while submitting the asset reclamation request, a **Schedule drop off**, **Schedule pickup**, or **Schedule shipment** task is created in the Enterprise Asset Reclamation Line.
3. Open the **Schedule drop off**, **Schedule pickup**, or **Schedule shipment** task that is present in the Enterprise Asset Reclamation Line.
4. On the form, fill in the fields.

Field names	Description
Number	Number assigned to the task.
Task Name	Name of the task.
Asset	Asset number and short description of the asset.
State	Current state of the task.
Return stockroom	Location where the reclaimed assets will be stored.
Assignment group	Group to which the Schedule shipment task is assigned.
Assigned to	User from the assignment group to whom the Schedule shipment task is assigned.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field names	Description
Quantity received	Number of consumables received.
Short description	Short description of the task.
Description	Detailed description of the task.
Carrier	Name of the carrier vendor who ships the asset to the stockroom. This is a mandatory field.
Tracking number	Shipment reference number given by the carrier vendor. This is a mandatory field.
Ship date	Date on which the asset is shipped. This is a mandatory field.
Work notes	Any additional information that you want to mention.

5. Select **Close Task**.
   The **Stage** field of the Enterprise Asset Reclamation Line form changes from **Ready** to **Pending received**.
   A Receive asset task is created in the Enterprise Asset Reclamation Line.
6. Open the Receive asset task.
7. On the Receive asset task form, fill in the fields.

Receive asset task form

Field names	Description
Number	Number assigned to the task.
Task name	Name of the task.
Asset	Asset number and short description of the asset.
State	Current state of the task.
Return stockroom	
Assignment group	Group to which the Receive asset task is assigned.
Quantity received	Number of consumables received. This field appears only if the Hardware Asset Reclamation Line was created for a consumable, and this is a mandatory field.
Assigned to	User from the assignment group to whom the Receive asset task is assigned.
Short description	Short description of the task.
Description	Detailed description of the task.
Work notes	Any additional information that you want to mention.

8. Select **Close Task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The **Stage** field of the Enterprise Asset Reclamation Line form changes from **Pending received** to **Pending evaluation**.

After an asset is received, in the asset form, the following changes occur:

- The **Assigned to** field on the asset record becomes empty.
- State of the asset changes to **In stock** and substate changes to**Pending repair**.

9. Open the Evaluate asset task.
10. On the Evaluate asset task form, fill in the fields.

Evaluate asset task form

Field names	Description
Assignment group	Group to which the Evaluate asset task is assigned.
Assigned to	User from the assignment group to whom the Evaluate asset task is assigned.
Evaluation status	Status of the reclaimed asset. This is a mandatory drop-down list and the values are: - Re-deployable - Needs repair - To be disposed
Work notes	Any additional information that you want to mention.

11. Select **Close Task**.
Based on what you selected from the **Evaluation status** drop-down list, the State and Substate of the asset change as follows:

Evaluation status values	Asset state	Asset substate
Re-deployable	In stock	Available
Needs repair	In stock	Pending repair
To be disposed	In stock	Pending dispose

The **Stage** field of the Enterprise Asset Reclamation Line form changes from **Pending evaluation** to **Complete**.

Note: When the stage of all Enterprise Asset Reclamation Lines has changed to **Closed Complete**, the state of the Asset Reclamation Request also changes to **Complete**.

Manage repair of defective assets in your stockroom in the Enterprise Asset Workspace

Use the Repair flow to get the defective enterprise assets in your stockroom fixed so that the repaired assets can be used in different Enterprise Asset Management workflows.

By using the Repair flow, your organization can internally fix the assets that are damaged or out of the warranty period. The repaired assets can be put back to use after validation. There's no external vendor involved in the repair of defective assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

As an asset manager, you can request repair of assets that are either defective or pending repair in your stockroom by submitting repair orders. For more details, see Request repair of defective enterprise assets. The repair flow is triggered when you submit a repair order. A repair order has repair order lines that are associated with repair tasks for the assets. The asset technician completes the repair tasks associated with the repair order. The repair flow completes after the repaired asset is evaluated and either put to use or disposed of.

Note: Asset technician can also complete the repair tasks by using the Mobile Agent application.

Stages in the Repair flow

1. Troubleshoot: Stage to evaluate the defective asset and assess the following:
   - Issues with the asset
   - Parts required
   - Steps to repair the defective asset

   At this stage, an asset technician confirms if the asset is repairable, redeployable, or unrepairable. The Repair flow proceeds to the next stage only if the asset is repairable. Otherwise the repair order is marked as Complete.
2. Repair: Stage to confirm repair of the defective asset. In this task, the asset is either repaired, redeployed, or marked as unrepairable.

   The repair flow proceeds to the next stage only if the asset is repaired. Otherwise the repair order is marked as Complete.
3. Evaluate: Stage to perform a quality control check of the repaired asset. Based on the evaluation results, the asset is either redeployed or disposed of. The Repair flow is completed after asset evaluation.

Note: You can specify the reason for the asset failure using failure codes in the Troubleshoot asset and Repair asset tasks. You can also specify the solution that you applied to address the asset issue using the resolution codes in the Repair asset task. These details are also available on the repair order line form. For more details, see Manage failure and resolution codes.

Request repair of defective enterprise assets

As an enterprise asset manager, you can get the defective enterprise assets repaired by creating Repair orders.

You can request repair of defective hardware assets through any of the following options:

- Request repair of enterprise assets using Service Catalog
- Create repair orders for enterprise assets in the Inventory view
- Request repair of an enterprise asset using the Repair option

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

Consider the following points when you create a repair order:

- You can't request repair of the following assets:
  - Consumables
  - Assets that are part of any other workflow
- You can request repair of a child asset only if you have added its parent asset to the repair order. However, assets in the pallets can be repaired.

Request repair of enterprise assets using Service Catalog

Submit a Service Catalog request to repair enterprise assets that are defective or pending repair in your stockroom.

Before you begin

Role required: sn_eam.enterprise_asset_manager or sn_eam.enterprise_asset_technician.

About this task

You can request repair of multiple defective enterprise assets in your stockroom using a single catalog request.

Procedure

1. Navigate to **All** > **Service catalog** > **Enterprise Asset Lifecycle** > **Asset Repair**.
2. On the form, fill in the fields.

Request for stockroom repair of an asset

Field	Description
Due Date	Date by which you want the defective assets to be repaired.
Stockroom	Stockroom that has assets to be repaired.

3. Select assets to be repaired.
   a. Select the Edit Asset(s) icon .
   b. Select the assets from the list.
   You can add one or more assets to the request.
   c. Select the Lock icon .
4. Select **Submit**.

Result

- Your repair request is submitted successfully.
- A repair order is created in the **Draft** stage.
- Each asset in the repair order is associated with a repair order line that is in the **Troubleshoot** stage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create repair orders for enterprise assets in the Inventory view

Request repair of enterprise assets that are defective or pending repair by creating a repair order in the Inventory view of Enterprise Asset Workspace.

Before you begin

Role required: sn_eam.enterprise_asset_manager or sn_eam.enterprise_asset_technician.

About this task

When you create a repair order from the Inventory view, you must explicitly create a repair order line for the asset that you want to get repaired.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Create a Repair order.
   a. Select **New**.
   b. On the form, fill in the fields.

      Note: The following fields are optional:
      - **Assignment group**
      - **Assigned to**
      - **Due date**
      - **Work note**

      #### Create New Repair order form

Field	Description
Stockroom	Stockroom that has assets to be repaired. This field is required.
Assignment group	Assignment group to which you want to assign the repair order.
Assigned to	Person from the assignment group who is primarily responsible for the Repair order.
Due date	Date by which the defective enterprise assets should be repaired.
Work notes	Notes about the repair order.

   c. Select **Save**.
      - A repair order that's in the **Draft** stage is created.
      - The **Repair order lines** tab is displayed next to the **Details** tab of the repair order.
4. Add repair order lines to the repair order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select the **Repair order lines** tab.

b. Select **Add**.

c. In the **Add assets** dialog box, select the assets and then select **Add**.

Note: You can add child assets of a pallet asset to the repair order. The asset that you added to the repair order is removed from the pallet automatically.

For each asset that you added, a repair order line that's in the **Troubleshoot** stage is created.

5. Select **Save**.

Request repair of an enterprise asset using the Repair option

Request repair of a defective enterprise asset in your stockroom directly through the asset form.

Before you begin

Role required: sn_eam.enterprise_asset_manager or sn_eam.enterprise_asset_technician.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Asset Estate**.
2. Select the **All assets** tab.
3. Select an asset with state as **In stock** and substate as **Defective** or **Pending repair**.
4. Select the More Options icon ••• on the Asset form.
5. Select **Repair**.

Result

A repair order with a repair order line in the **Troubleshoot** stage is created.

Fulfilling repair orders in the Enterprise Asset Workspace

You can fulfill repair orders for your defective and out-of-warranty enterprise assets by completing all repair asset tasks that are associated with the corresponding repair order lines. You can fulfill these orders either manually or through the help repair enterprise assets agentic workflow.

Fulfill repair orders by using an agentic workflow

You can use the help repair enterprise assets agentic workflow to help you manage and complete the troubleshooting and repair of your defective enterprise assets. The workflow uses a collection of AI agents to automatically generate comprehensive troubleshooting, diagnostics, and repair instructions for these assets. The workflow uses also uses these AI agents to automatically validate, update, and close relevant tasks.

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

Note: Before you use the help repair enterprise assets agentic workflow, you can configure and activate it based on your organization's needs. For detailed instructions, see Configure and activate agentic workflows for Enterprise Asset Management.

Important: This agentic workflow is turned on by default. For more information, see AI agents, skills, and agentic workflows on by default.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Help repair enterprise assets agentic workflow overview

The help repair enterprise assets agentic workflow helps you manage and complete your enterprise asset troubleshooting and repairs. This workflow provides the following benefits:

- Streamlines the troubleshooting and repair process.
- Improves the accuracy and consistency of your troubleshooting and repairs.
- Increases troubleshooting and repair completion rates.
- Enhances and simplifies the user experience.

Important: You can enable security implementation to execute AI agents and agentic workflows through Access Control Lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in AI agents.

Important: By default, all agentic workflows and AI agent records are read-only.

Role masking

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Validating repair asset tasks

Before the help repair enterprise assets agentic workflow can help you manage and complete the troubleshooting or repair of a defective enterprise asset, it must validate the corresponding repair asset task. The workflow proceeds only if the task meets the following criteria:

- The task has a valid and unique task number.
- The task is active.
- The task has not already been completed.
- The task is assigned to a user with the sn_eam.asset_technician role.
- The asset is associated with one of the following models:
  - Any valid enterprise model
  - Any valid hardware model that is supported by the OT Asset Management application

Stages in the help repair enterprise assets agentic workflow

The help repair enterprise assets agentic workflow helps you manage and complete the troubleshooting and repair of defective enterprise assets through the following stages.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow stages

Stage	Steps
Enterprise asset repair initiation	**1.** A user with the sn_eam.asset_technician role requests the repair of a defective enterprise asset through one of the following options: ○ The Service Catalog application For more information on this request option, see Request repair of enterprise assets using Service Catalog. ○ The Inventory view of the Enterprise Asset Workspace For more information on this request option, see Create repair orders for enterprise assets in the Inventory view. ○ The Repair option on the corresponding asset record For more information on this request option, see Request repair of an enterprise asset using the Repair option. **2.** A repair order and corresponding repair order line are created. **3.** A troubleshooting-based repair asset task is automatically generated for the repair order line.
Repair asset task assignment	**1.** The repair asset task must be assigned to a user with the sn_eam.asset_technician role. ○ If the task is not already assigned to a user, a new user assignment must be added. ○ If the task is already assigned to a user, the user assignment can be updated. **2.** After the user assignment is added or updated, the help repair enterprise assets agentic workflow invokes automatically. **Note:** If the trigger to invoke the workflow is deactivated, the workflow must be invoked manually. For instructions on how to activate or deactivate this trigger, see Activate an agentic workflow template. **Note:** The progress of the workflow is updated and displayed in the ServiceNow Otto panel. Users can access the panel by selecting the ServiceNow Otto icon on the page header of their ServiceNow instance.
Repair asset task validation	The asset next best action AI agent validates the repair asset task. **Note:** For the complete list of validation criteria, refer to Validating repair asset tasks.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow stages (continued)

Stage	Steps
	• If the validation is successful, the workflow can proceed with helping the user troubleshoot the asset. • If the validation is unsuccessful, the task must be updated and then re-validated.
Asset troubleshooting	After the repair asset task is successfully validated, the workflow helps the user troubleshoot the asset. **1.** The asset next best action AI agent triggers the evaluate asset AI agent. **2.** The evaluate asset AI agent performs a web search to identify potential asset issues and to generate corresponding troubleshooting steps. **Note:** All troubleshooting steps are displayed in the ServiceNow Otto panel. **3.** The user who is assigned to the repair asset task must perform all troubleshooting steps to determine the asset issue. **4.** In the ServiceNow Otto panel, the AI agent asks the user to confirm if the troubleshooting steps helped with determining the asset issue. **5.** Depending on if the troubleshooting steps helped the user, the workflow proceeds as follows: ○ If the troubleshooting steps helped, the AI agent asks the user to confirm whether the asset is repairable, unrepairable, or redeployable. The workflow then proceeds to step 6. **Note:** If the user confirms that the asset is repairable, a corresponding repair-based repair asset task is automatically generated. The user is automatically assigned to this task. ○ If the troubleshooting steps did not help, the AI agent refines its web search. The workflow then returns to step 2. **6.** The AI agent requests details about the asset issue. **7.** After the user provides all necessary details, the repair asset task is closed. **Note:** You can view details about the completed troubleshooting steps in the work notes of the repair asset task. **8.** Depending on whether the asset is repairable, unrepairable, or redeployable, the workflow proceeds as follows: ○ If the asset is repairable, the workflow proceeds with helping the user repair it. ○ If the asset is unrepairable, the user must dispose of it. For more information on asset disposals, see Create a disposal order in the Enterprise Asset Workspace. ○ If the asset is redeployable, the user can help redeploy it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow stages (continued)

Stage	Steps
Repair asset task validation	If the user confirmed that the asset is repairable, the asset next best action AI agent validates the corresponding repair-based repair asset task that was automatically generated. **Note:** For the complete list of validation criteria, refer to Validating repair asset tasks. • If the validation is successful, the workflow can proceed with helping the user repair the asset. • If the validation is unsuccessful, the task must be updated and then re-validated.
Asset repair	After the repair asset task is successfully validated, the workflow helps the user repair the asset. **1.** The asset next best action AI agent triggers the repair asset AI agent. **2.** The repair asset AI Agent performs a web search to generate repair steps based on the asset issue that was determined during troubleshooting. **Note:** All repair steps are displayed in the ServiceNow Otto panel. **3.** The user who is assigned to the repair asset task must perform the repair steps. **4.** In the ServiceNow Otto panel, the AI agent asks the user to confirm if the repair steps helped with resolving the asset issue. **5.** Depending on if the repair steps helped the user, the workflow proceeds as follows: ○ If the repair steps helped, the AI agent asks the user to confirm whether the asset was repaired, unrepairable, or redeployable. The workflow then proceeds to step 6. ○ If the repair steps did not help, the AI agent refines its web search. The workflow then returns to step 2. **6.** The repair asset task is closed. **Note:** You can view details about the completed repair steps in the work notes of the repair asset task. ○ If the repair asset task is closed with a resolution of Repaired, a corresponding Evaluate asset task is automatically generated. The user must then evaluate the repair to confirm if the asset is redeployable or must be disposed of. For more information on evaluating an asset repair, see Evaluate the repaired asset in the Enterprise Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow stages (continued)

Stage	Steps
	○ If the repair asset task is closed with a resolution of Unrepairable, the user must dispose of the asset. For more information on asset disposals, see Create a disposal order in the Enterprise Asset Workspace. ○ If the repair asset task is closed with a resolution of Redeployable, the user can help redeploy it.

AI agents used in the help repair enterprise assets agentic workflow

The help repair enterprise assets agentic workflow uses the following AI agents to execute tasks that help you manage and complete your enterprise asset repairs and troubleshooting.

AI agents and their roles in the help repair enterprise assets agentic workflow

AI agent	AI agent role
Asset next best action AI agent	• Validates repair asset tasks. • Based on the task type of a given repair asset task, the asset next best action AI agent can trigger one of the following AI agents to help manage and complete the task: ○ Evaluate asset AI agent to manage a troubleshooting-based repair asset task ○ Repair asset AI agent to manage a repair-based repair asset task
Evaluate asset AI agent	• Identifies potential asset issues. • Generates comprehensive instructions to help troubleshoot assets. • Updates and closes troubleshooting-based repair asset tasks.
Repair asset AI agent	• Generates comprehensive instructions to help repair assets. • Updates and closes repair-based repair asset tasks.

Manually fulfill repair orders in the Enterprise Asset Workspace

Manually fulfill a repair order by completing all the open repair asset tasks associated with its repair order lines.

A repair order can have one or more repair order lines depending on the number of assets to be repaired through that repair order. A repair order is fulfilled only when all its repair order lines are completed.

As a technician, you must complete the following tasks associated with each repair order line to fulfill a repair order:

1. Troubleshoot asset
2. Repair asset
3. Evaluate asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can also work on the asset repair tasks assigned to you by using the Mobile Agent application. For details, see Manage enterprise asset repair tasks using the Mobile Agent application.

View open repair orders for your stockroom in the Enterprise Asset Workspace

View the open repair orders for your stockroom to get the details of the repair order lines and repair tasks that need action.

Before you begin

Role required: sn_eam.enterprise_asset_technician and sn_eamenterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom.
   In the Open stockroom tasks section, the **Open repair orders** card displays the number of open repair orders.
4. Select the **Open repair orders** card.

Result

The list of open repair orders for the stockroom is displayed.

Troubleshoot assets requested for repair in the Enterprise Asset Workspace

Complete the troubleshooting task to assess the issues with the defective asset. Based on your observations, you can confirm whether the asset can be repaired, redeployed, or should be disposed of.

Before you begin

Role required: sn_eam.enterprise_asset_technician

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select a repair order that's in the Draft or In Progress stage.
4. Select the **Repair order lines** tab.
5. Select a repair order line that's in the Troubleshoot stage and Open state.
6. Select the **Repair asset tasks** tab.
7. Select the **Troubleshoot asset** task that's in the Open state.
8. Indicate that you have started working on the Troubleshoot task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. **Optional:** Record the time worked on the task.
   You can either use the timer or record the time manually. For more details, see Record time worked on asset repair tasks in the Enterprise Asset Workspace.
   An entry for the time you worked is created in the **Time Worked** tab of the Troubleshoot asset task.
10. Select the **Details** tab.
11. Select the troubleshooting result in the **Troubleshoot result** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If the asset is repairable, select **Repairable**.
- If the asset is unrepairable, select **Unrepairable**.
- If the asset can be redeployed, select **Redeployable**.

12. **Optional:** In the **Failure code** field, select the code that corresponds to the reason for the asset failure.
    For more details on codes, see Manage failure and resolution codes.
13. **Optional:** Enter the issue identified with the asset during the repair process in the **Issue identified** field.
    Once the task is closed, this field can't be modified.
    The value in the **Issue identified** field is carried forward to the repair asset task after the troubleshooting task is closed.
14. Enter notes related to the task in the **Work notes** field.
15. Select **Close task**.

Result

- If you had set the Troubleshooting result to **Unrepairable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and substate changes to Pending disposal.
- If you had set the Troubleshooting result to **Redeployable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Available.
- If you had set the Troubleshooting result to **Repairable**, the following changes happen on closure of the task:
  1. The stage of the repair order line changes to Repair.
  2. The state of the asset changes to In stock and the substate changes to Pending repair.
  3. Repair asset task is created.

What to do next

Complete the repair asset task in the Enterprise Asset Workspace.

Complete the repair asset task in the Enterprise Asset Workspace

Complete the repair of the asset and confirm if the asset is repaired, unrepairable, or redeployable.

Before you begin

Role required: sn_eam.enterprise_asset_technician

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order for which you want to complete the Repair asset task.
4. Select the **Repair order lines** tab.
5. Select the repair order line that's in the **Repair** stage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select the **Repair asset tasks** tab.
7. Select the **Repair asset** task that's in the Open state.
8. Indicate that you have started working on the Repair asset task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. **Optional:** Record the time worked on the task.
   You can either use the timer or record the time manually. For more details, see Record time worked on asset repair tasks in the Enterprise Asset Workspace.
   An entry for the time you worked is created in the **Time Worked** tab of the Repair asset task.
10. Select the **Details** tab.
11. Select the repair result in the **Repair result** field.
    - If the asset is repaired, select **Repaired**.
    - If the asset couldn't be repaired, select **Unrepairable**.
    - If the asset can be redeployed, select **Redeployable**.
12. **Optional:** In the **Failure code** field, select the code that corresponds to the reason for the asset failure.
    This field shows the failure code that you selected in the Troubleshoot task. However, you can update this field if the reason for the asset failure differs from what was identified in the Troubleshoot task. For more details on codes, see Manage failure and resolution codes.

    Note: The Failure code field value that you selected is also displayed in the Evaluate Asset task and the repair order line.

13. **Optional:** In the **Resolution code** field, select the code that matches the solution that you applied to fix the asset failure.

    Note: The Resolution code field value that you selected is also displayed in the Evaluate Asset task and the repair order line.

14. **Optional:** Enter the issue identified with the asset during the repair process in the **Issue identified** field.

    (Optional) This field is automatically populated with the value carried forward from the troubleshoot asset task if the issue is identified and a value is provided in the **Issue identified** field. Once the task is closed, this field can’t be modified.

    The value in the **Issue identified** field is carried forward to evaluate repaired asset task after the repair task is closed.
15. Enter notes related to the task in the **Work notes** field.
16. Select **Close task**.

Result

- If you had set the Repair result to **Unrepairable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Pending disposal.
- If you had set the Repair result to **Redeployable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Available.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If you had set the Repair result to **Repairable**, the following changes happen on closure of the task:
  1. The stage of the repair order line changes to Evaluate.
  2. The state of the asset changes to In stock and the substate changes to Pending evaluation.
  3. Evaluate asset task is created.

What to do next

Evaluate the repaired asset in the Enterprise Asset Workspace.

Evaluate the repaired asset in the Enterprise Asset Workspace

Evaluate the repaired asset and confirm if the asset is redeployable or should be disposed of. The Repair flow completes after the repaired asset is evaluated.

Before you begin

Role required: sn_eam.enterprise_asset_technician

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order for which you want to evaluate the repaired asset.
4. Select the **Repair order lines** tab.
5. Select a repair order line that's in the Evaluate stage and Open state.
6. Select the **Repair asset tasks** tab.
7. Select the **Evaluate asset** task that's in the Open state.
8. Indicate that you have started working on the Evaluate asset task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. **Optional:** Record the time worked on the task.
   You can either use the timer or record the time manually. For more details, see Record time worked on asset repair tasks in the Enterprise Asset Workspace.
   An entry for the time you worked is created in the **Time Worked** tab of the Evaluate asset task.
10. Select the **Details** tab.
11. Select the evaluation result in the **Evaluation result** field.
    - If the asset is repaired and redeployable, select **Redeployable**.
    - If the asset can't be used and should be disposed of, select **To be disposed**.
12. **Optional:** Enter the issue identified with the asset during the repair process in the **Issue identified** field.
    This field is automatically populated with the value carried forward from the repair asset task if the issue is identified and a value is provided in the **Issue identified** field. Once the task is closed, this field can’t be modified.
13. Enter notes related to the task in the **Work notes** field.
14. Select **Close task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- If you had set the Evaluation result to **To be disposed**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Pending disposal.
- If you had set the Evaluation result to **Redeployable**, the following changes happen on closure of the task:
  1. The repair order and the repair order line are in the Completed stage.
  2. The state of the asset changes to In stock and the substate changes to Available.

Bulk close asset repair tasks in the Enterprise Asset Workspace

Complete and close multiple repair tasks at one go to process a repair order with multiple repair order lines.

Before you begin

Role required: sn_eam.enterprise_asset_technician

About this task

You can bulk close only similar asset repair tasks that are in the Open state. However, you can't bulk close similar repair tasks for which the task result isn't the same. For example, you can't bulk close two Troubleshoot assets tasks, when one task has a repairable asset and the other has an unrepairable asset.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select a repair order with multiple open repair order lines for which you want to complete the asset repair tasks.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you want to complete.
6. Select the repair task that you want to close.
7. On the Details form, select the task result.
   - If you're completing a Troubleshoot asset task, then select any of the following results in the **Troubleshoot result** field:
     - **Repairable**
     - **Unrepairable**
     - **Redeployable**
   - If you're completing a Repair asset task, then select any of the following results in the **Repair result** field:
     - **Repaired**
     - **Unrepairable**
     - **Redeployable**
   - If you're completing an Evaluate asset task, then select any of the following results in the **Evaluation result** field:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Redeployable**
- **To be disposed**

8. Enter notes related to the task in the **Work notes** field.
9. Select **Save**.
10. Select **Bulk Close**.
    The **Select Assets** dialog box with similar repair tasks is displayed.
11. Select the tasks that you want to close and select **Close Task**.

Result
All the selected repair tasks are closed with the same task result and Work notes.

Cancel a repair order in the Enterprise Asset Workspace

Cancel a repair order that no longer needs to be fulfilled.

Before you begin
Role required: enterprise_asset

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select a repair order that's in the Draft or In Progress stage.
4. Select **Cancel**.

Result
- The stage of the repair order changes to Cancelled and the state changes to Closed Incomplete.
- The stage and state of the repair order lines that weren't completed change to Cancelled and Closed Incomplete.

Cancel a repair order line in the Enterprise Asset Workspace

Cancel a repair order line that no longer needs to be fulfilled.

Before you begin
Role required: enterprise_asset

Procedure
1. Navigate to **All** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select a repair order that's in the **Draft** or **In progress** stage.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you want to cancel.
   You can cancel a repair order line that is not in the Completed stage.
6. Select **Cancel**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The stage of the repair order line changes to Cancelled and the state changes to Closed Incomplete.
- The state of the associated repair asset tasks that were open changes to Closed Incomplete.
- The stage of the repair order changes to Cancelled only if there aren't any other repair order lines that are in the Troubleshoot, Repair, Evaluate, or Completed stage.

Record time worked on asset repair tasks in the Enterprise Asset Workspace

Manage and record time worked on Troubleshoot asset, Repair asset, and Evaluate asset tasks in the Enterprise Asset Workspace. After you start work on a repair asset task, you can pause and resume work. You can also record the time worked manually.

Record time worked on a repair task automatically in the Enterprise Asset Workspace

Record the time that you took to complete a repair task without taking any break until you completed the task.

Before you begin

Role required: enterprise_asset_technician

About this task

You can record the time worked for Troubleshoot asset, Repair asset, and Evaluate asset tasks that are in the Open state.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order that you're working on.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you're working on.
6. Select the **Repair asset tasks** tab.
7. Select the asset repair task for which you want to record the time worked.
8. Indicate that you started work on the task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. Select **Start Timer**.
10. After you have completed working on the task, on the **Details** form, select the task result.
    - If you have completed a Troubleshoot asset task, then select any of the following results in the **Troubleshoot result** field:
      - **Repairable**
      - **Unrepairable**
      - **Redeployable**
    - If you have completed a Repair asset task, then select any of the following results in the **Repair result** field:
      - **Repaired**
      - **Unrepairable**
      - **Redeployable**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If you have completed an Evaluate asset task, then select any of the following results in the **Evaluation result** field:
  - **Redeployable**
  - **To be disposed**

11. Enter notes related to the task in the **Work notes** field.
12. Select **Close Task**.

Result
The actual time you worked on the task completion is automatically calculated. An entry for the time worked is created in the Time Worked tab of the asset repair task.

Record time worked on a repair task manually in the Enterprise Asset Workspace

Create an entry for the time worked on a repair task manually in the Enterprise Asset Workspace.

Before you begin
Role required: enterprise_asset_technician

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order that you're working on.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you're working on.
6. Select the **Repair asset tasks** tab.
7. Select the task for which you want to record time manually.
8. Indicate that you started work on the task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
9. Select **Record Time**.
10. In the **Record Time** dialog box, enter the details of the time worked.
    a. Enter the time duration that you worked on the task in the **Days**, **Hours**, and **Minutes** fields.
    b. **Optional:** Provide any additional information in the **Comments** field.
11. Select **Save**.

Result
The Time Worked form is saved and the time card is added to the Time Worked tab of the asset repair task.

Pause a repair task in the Enterprise Asset Workspace

Record a break from a repair task in the Enterprise Asset Workspace if you're not continuing to work on it. Resume the task when you start working on it again. The system automatically tracks and calculates the actual time taken to complete the task even though the work was interrupted.

Before you begin
You can pause an asset repair task that is in the Work in Progress state. The option to pause the task is available only after you perform the following actions for the asset repair task:

1. Indicate that you have started working on the task by selecting **Start Work**.
2. Start recording the time by selecting **Start Timer**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role required: asset_technician

Before you begin
Role required: enterprise_asset_technician

Procedure
1. Navigate to **Workspaces** > **Hardware Asset Workspace** > **Inventory**.
2. Select the **Repair orders** tab.
3. Select the repair order that you're working on.
4. Select the **Repair order lines** tab.
5. Select the repair order line that you're working on.
6. Select the **Repair asset tasks** tab.
7. Select the task that you want to pause.
8. Select **Pause Work**.
   The **Pause Work** changes to **Resume Work**.
9. Select **Resume Work** when you're ready to work on the activity again.

Result
Each time you pause or resume work on the task, the actual time you worked on the task is automatically calculated. An entry for the time worked is created in the Time Worked tab.

Manage enterprise asset picking within your stockrooms

Inventory picking enables inventory users to locate and pick assets within large stockrooms. When you enable asset pick tasks for a stockroom and provide granular location details, technicians can retrieve assets quickly and efficiently.

The Inventory picking feature includes adding an Asset pick task in the following Enterprise Asset Management workflows:

- Standard Enterprise Asset Request
- Enterprise Refresh Request
- Sourcing workflow

Note: The Asset pick task is available only if it's enabled explicitly for a stockroom that's used to source asset requests, refresh requests, or sourcing requests. For details, see Enable the Asset pick task for your stockroom in the Enterprise Asset Workspace.

The Asset pick task enables you to pick the assets from any aisle and space within your stockroom. You can then drop the picked asset to a specified place within the stockroom. After you complete the Asset pick task, asset technicians can pick up the assets to fulfill the requests assigned to them.

Asset technicians can also use the Mobile Agent application to work on the assigned asset pick tasks. For details, see Manage enterprise asset pick tasks using the Mobile Agent application.

Enable the Asset pick task for your stockroom in the Enterprise Asset Workspace

Enable the Asset pick task for your stockroom so that the task is automatically added to Standard Enterprise Asset requests, Enterprise Asset Refresh requests, and Sourcing workflow.

Before you begin
Role required: inventory_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of available stockrooms, select the stockroom for which you want to enable the Asset pick task and Asset put away task.
4. On the Stockroom Details form, select the **Warehouse tasks required** check box.
5. Select **Save**.

Add aisles and spaces to a stockroom in the Enterprise Asset Workspace

Add details of aisles and spaces in a stockroom to provide granular location details of an asset in that stockroom. The aisle and space details enable you to locate and pick an asset in the stockroom.

Before you begin

Role required: inventory_user

About this task

A space is associated with an aisle in the stockroom. You can add a space only after you have added a minimum of one aisle to the stockroom.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select a stockroom.
4. Select the **Aisle and spaces** tab.
   The list of existing aisles and spaces in that stockroom is displayed.
5. Add aisles to the selected stockroom.

   a. Select **Add aisle**.

      The **Add aisle** dialog box is displayed.

   b. In the **Aisle** field, enter a unique identifier for the aisle.

      You can enter any string value in this field. For example, `aisle_0001`.

   c. **Optional:** To add more aisles, select the Add icon + and enter a unique identifier for the aisle in the **Aisle** field.

   d. Select **OK**.

   The aisle is added to the list in the Aisle and spaces tab.
6. Add a space to an aisle in the stockroom.

   a. Select **Add space**.
      The **Add space** dialog box is displayed.

   b. In the **Aisle** field, select the aisle for which you want to add a space.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. In the **Space** field, enter a unique identifier for the space.

   You can enter any string value in this field. For example, `space_0001`.

d. **Optional:** To add more spaces, select the Add icon + and enter a unique identifier for the space in the **Space** field.

e. Select **OK**.

- The space is added to the list in the Aisle and spaces tab.
- The display name of the space is automatically set based on the **Aisle** and **Space** fields. For example, the display name of the space whose aisle is aisle_001 and space is space_001 is **aisle_001 - space_001**.

View the open enterprise asset pick tasks for your stockroom

View the open asset pick tasks for your stockroom to get the details of the tasks that need action.

Before you begin

Role required: inventory_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom.
   In the Open stockroom tasks section, the **Open pick tasks** card displays the number of open pick tasks.
4. Select the **Open pick tasks** card.

Result

The list of open asset pick tasks for the stockroom is displayed.

What to do next

Manage all the enterprise asset pick tasks assigned to you by using the Mobile Agent application. For details, see Manage enterprise asset pick tasks using the Mobile Agent application.

Manage asset put away using the Enterprise Asset Workspace

Enable the Asset put away task explicitly for your stockroom to put away the assets from the receiving bay in the designated aisle-space. View the open Asset put away task and close it after specifying the aisle-space value to move the asset in the stockroom.

The Asset put away task enables you to track asset movement from the receiving bay of the inventory to the designated space within the stockroom. The Asset put away task confirms that when an asset is received in the inventory, you have filled the aisle-space information for it. An Asset put away task is automatically created in the Enterprise Asset Management when the following required business rules are met:

- When an enterprise asset is created in the Enterprise Asset Management and the **Aisle-space** field value isn't available, an Asset put away task is created. Open the Asset put away task and updated the **Drop off location** field value, to move the asset to designated aisle-space in the stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: You can create an Asset put away task manually for the in stock assets in the inventory. For more information about manually creating an Asset put away task in the Enterprise Asset Management, see Create an Asset put away task in the Enterprise Asset Workspace.

- When the **Stockroom** field is updated for an enterprise asset in the Asset Details form, an Asset put away task is created. Open the Asset put away task and update the **Drop off location** field value, to move the asset to the designated aisle-space in the stockroom.

Note: You can create the Asset put away task for a stockroom only if the stockroom is enabled to perform warehouse tasks. For more information about enabling the feature, see Enable the asset put away task for your stockroom in the Enterprise Asset Workspace.

In the Enterprise Asset Workspace, the inventory users can perform the following actions:

- Create an Asset put away task manually for the in stock assets. For more information, see Create an Asset put away task in the Enterprise Asset Workspace.
- View the open put away tasks related to the inventory and stockroom. For more information, see View open put away tasks for your stockroom in the Enterprise Asset Workspace.
- Update the **Drop off location** field for the open task in the Put away form and close it. For more information, see Close an Asset put away task in the Enterprise Asset Workspace.

Using the ServiceNow Agent application, you can scan the in stock assets in the inventory and put away them in the scanned drop-off location. After the asset is placed in the drop-off location within the stockroom, you can close the Asset put away task. For more information on the mobile experience for Asset put away task, see Manage enterprise asset put away using the ServiceNow Agent application.

Enable the asset put away task for your stockroom in the Enterprise Asset Workspace

Enable the Asset put away feature for your stockroom so that the Asset put away task is automatically created to track asset movement.

Before you begin
Role required: inventory_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Asset Workspace* > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of available stockrooms, select the stockroom for which you want to enable the Asset pick task and Asset put away task.
4. On the Stockroom Details form, select the **Warehouse tasks required** check box.
5. Select **Save**.

Result
The inventory user can perform asset put away for in stock assets in the stockroom.

View open put away tasks for your stockroom in the Enterprise Asset Workspace

View the open put away tasks for your stockroom in the Enterprise Asset Workspace to get the details of the tasks that need action.

Before you begin
Role required: inventory_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > *Enterprise Asset Workspace* > **Inventory**.
2. View the open put away task either from the Inventory overview section or the All Stockrooms tab.
   - In the Inventory overview section, select the **Open put away tasks** number.
   - In the **Stockrooms** tab, select a stockroom. In the Open stockroom tasks section, select the **Open put away tasks** number.

Result
The list of open Asset put away tasks are displayed.

What to do next
Put away the asset in the desired drop-off location in the stock room and close the Asset put away task after adding the **Drop off location** field value in the Asset put away task form. For more information about closing Asset put away task, see Close an Asset put away task in the Enterprise Asset Workspace.

Create an Asset put away task in the Enterprise Asset Workspace

Create an Asset put away task manually for the In stock assets in the Enterprise Asset Workspace to track the movement of assets within the stockroom.

Before you begin
Role required: inventory_user

About this task
You can create an asset put away task in the Enterprise Asset Workspace for the In stock assets for which the **Aisle and Space** field value isn't already specified. When you create a put away task, you can either directly close the task or save it. To close the task, the **Drop off location** field value is required.

Procedure

1. Navigate to **Workspaces** > *Enterprise Asset Workspace* > **Inventory**.
2. Open the Create New Asset put away task form either from the Inventory overview section or the All Stockrooms tab.
   - In the Inventory overview section, select the **Open put away tasks** card and select **New**.
   - In the Stockrooms tab, select a Stockroom and then in the Open stockroom tasks section, select the **Open put away tasks** card. Select **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Asset put away task fields.
4. Save your modifications.
   - To save your changes and create the Asset put away task, select **Save**.
   - To save your changes and close the Asset put away task, select **Close task**.

> **Note:** **Drop off location** field value is required to close the Asset put away task.

Close an Asset put away task in the Enterprise Asset Workspace

Add the asset drop-off location for an open Asset put away task and close it in the *Enterprise Asset Workspace*.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: inventory_user

About this task
You can bulk close selected Asset put away tasks that are open and assigned to you by specifying a drop-off location, which moves all associated assets to that location. You can also close individual tasks by specifying a drop-off location.

Note: When you make the following changes to an enterprise asset, the associated Asset put away task is closed:

- When the asset's **Aisle and Space** value is filled, the associated Asset put away task for the asset is closed, and the **State** field is updated to **Closed Complete**.
- When the asset's **State** is updated from In stock to some other value without adding the **Aisle and Space** field value, the associated Asset put away task is closed and its **State** field is updated to **Closed Incomplete**.

Procedure
1. Navigate to **Workspaces** > *Enterprise Asset Workspace* > **Inventory**.
2. Open the put away task either from the Inventory overview section or the **All Stockrooms** tab.
   - In the Inventory overview section, select the **Open put away tasks** card and select the **Number** link to open the Asset put away task.
   - In the **All Stockrooms** tab, select a stockroom. In the Open stockroom tasks section, select the **Open put away tasks** card and then select the **Number** link to open the Asset put away task.
3. In the Put away task form, select the **Drop off location** value.
4. Save your modifications or close the put away task.
   - To close the put away task, select **Close task**.
   - To save your changes and stay on the same page, select **Save**.
   - To close multiple put away tasks, select **Bulk close**.

     The **Select Assets** dialog box is displayed listing the Asset put away tasks assigned to you. Select the tasks that you want to close and select **Close Task**.

Result
- Closed tasks aren't displayed in the Open put away tasks list.
- The task closure is captured in the **Activity** tab. The name of the user who closed the task is shown in the work notes.

.

Manage the receiving of assets at stockrooms in the Enterprise Asset Workspace

As an enterprise asset manager or enterprise asset technician, receive enterprise and consumable assets at stockrooms from any workflow at a centralized location on the stockroom form in the Enterprise Asset Workspace.

With the standardized receiving process, you don't need to be familiar with the specific workflow to which the assets belong. Therefore, you can receive hardware and consumable assets from different shipments originating from sources, like transfer orders, purchase orders, or any other workflows seamlessly.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Requirements and limitations

- You can receive enterprise assets in the Hardware Asset Workspace only if the Enterprise Asset Management application is activated.
- You can receive hardware assets in the Enterprise Asset Workspace only if the Hardware Asset Management application is activated.
- You can only receive complete quantity of consumables.
- You can receive assets from a purchase order line only in the Zurich or later releases.

Asset receiving mechanisms

You can receive a single asset or multiple assets in bulk using any of the following options on the enhanced stockroom form:

- **Receive assets**: You can either search for an asset using its Asset Tag, Serial Number, or MAC address and receive it, or select one or more assets from the list of inbound shipment assets and receive them. For more details, see Receive an enterprise asset at a stockroom in the Enterprise Asset Workspace and Receive assets from inbound shipments at your stockroom in the Enterprise Asset Workspace.
- **Import assets**: You can download the Excel template, add the asset details that you want to receive, and import the Excel template. During the import process, the system performs validations, and you can view the imported asset records, validation status, and comments in the Import asset row [sn_itam_cmn_import_asset_row] table. Based on the validation status, you can select and receive the assets. If there are any issues with the asset records, you must address those issues before you can receive the assets. For more details, see Import and receive assets in bulk at your stockroom in the Enterprise Asset Workspace.

When any asset is received at the stockroom, the following changes happen:

- The State of the asset changes from **In transit** to **In stock**.
- The stockroom field on the asset form is automatically updated.
- The receive tasks in the source workflows associated with the asset that you received are automatically closed.

Depending on the number and type of assets that you want to receive, you can select from the following options to receive assets at your stockroom:

- Receive a single enterprise asset at your stockroom.
- Receive one or more enterprise and consumable assets from the list of shipment assets.
- Import and receive enterprise and consumable assets in bulk through an Excel template.

> **Note:** You should have the sn_eam.enterprise_admin role to import asset records using the Excel template.

Receive an enterprise asset at a stockroom in the Enterprise Asset Workspace

Receive a single enterprise asset that has arrived at your stockroom, whether it's part of a workflow or not, in the Enterprise Asset Workspace.

Before you begin

Role required: sn_eam.asset_technician or sn_eam.enterprise_asset_manager

About this task

This task enables you to receive assets in the following scenarios:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Receiving an enterprise asset with an existing record

When you’re receiving an enterprise asset from workflows such as a transfer order or Return Merchandise Authorization (RMA), where a repaired asset has arrived at your stockroom, the asset record exists in your ServiceNow instance. You can search for the existing asset record using the Asset tag or Serial number and then receive the asset, which automatically closes the receive task of the source workflow.

Receiving a new enterprise asset at your stockroom

When you're physically receiving a new enterprise asset at your stockroom, it's likely that the asset record isn't present in your ServiceNow instance. You can receive new assets through workflows like a purchase order, asset refresh, or RMA with a replacement asset. Through this task, you can create an asset record and associate it with the source workflow, which automatically closes the receive task linked to the source workflow.

Receiving an independent enterprise asset

You can receive an enterprise asset that isn't part of any workflow and has arrived at your stockroom.

Important: You can also receive an hardware asset only if the Hardware Asset Management application is activated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom for which you want to receive the hardware asset.
4. Select **Receive assets**.
5. Find the enterprise asset that you want to receive.

   a. In the Receive assets dialog box, enter the Asset tag or Serial number of the asset that you want to receive in the search field.

   b. Select **Search**.

   - If the asset record is found, it appears in the Assets list.

     Note:

     The following asset details are displayed:

     - **Display name**
     - **Model category**
     - **Asset tag**
     - **Quantity**
     - **State**
     - **Stockroom**
     - **Location**

   - If the asset record isn't found, a message appears indicating that the asset isn't found, along with an option to create the asset record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Receive the enterprise asset in your stockroom.
   - If the asset record is found in the Assets list, select the asset record and then select **Receive**.

     Result

     - The State of the asset changes from **In transit** to **In stock**.
     - The **Stockroom** field on the asset form is automatically updated with the stockroom at which you received the asset.
     - The receive task in the source workflow associated with the asset that you received are automatically closed.

   - If the asset record isn't found, create one to receive.

     a. Select **Create asset**.

     b. In the Create asset dialog box, enter the details.

Create asset dialog box

Field	Description
Model	Specific product model of the asset. This field is required.
Model Category	Model grouping of the asset. This field is required.
Serial Number	Serial number of the asset. **Note:** Depending on the Model Category that you selected, this field is either required or optional. For instance, Serial number is required for Computer model category. Unique fields that are required on the asset records are defined by the identification rules on the associated CI classes defined in the Identification and Reconciliation engine (IRE). When you create an asset whose model category is linked to a CI class with an identification rule, you should provide details for at least one of the fields, such as Asset tag, Serial number, and MAC address, that uniquely identify the asset.
Asset Tag	Tag to help track the asset.
Mac Address	MAC address of the asset.
Stockroom name	Name of the stockroom that you selected to receive the asset. This field is automatically populated and is read only.
Source type	Source workflow to which the asset that you're receiving belongs. ▪ To receive the asset from a purchase order, select **PO**. ▪ To receive the asset from the RMA flow, select **Asset RMA**. ▪ To receive the asset through asset refresh workflow, select **Refresh**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Source ticket	Request number of the source workflow that's associated with the asset that you want to receive. ▪ To receive an asset from a purchase order or asset refresh order, select the associated PO line number. ▪ To receive an asset from an RMA order, select the associated RMA line number. **Note:** Source tickets are displayed based on the model and source type that you selected.

Important:

Providing the Source type and Source ticket details is optional when creating an asset record. However, including these details links the enterprise asset to the source workflow. This link results in the automatic closure of the Receive task in the source workflow when the asset is created. If you don't include these details, the asset record is still created, but you should close the Receive task manually in the source workflow.

Note the following points before you consider creating an asset record:

- If you're receiving an asset from an RMA workflow, you can create an asset record first. Later, you can manually add the details of this asset in the Asset RMA receive task, and then close the task.
- If you're receiving an asset from a purchase order, you can create an asset record for the asset you physically received. However, you can't receive the same asset later through the Receive task on the purchase order.

c. Select **Create**.

Result

- An asset record is created with State as **In stock** and Substate as **Available**.
- The **Stockroom** field on the asset form is automatically updated with the stockroom at which you received the asset.
- The receive task in the source workflow is automatically closed only if you provided the Source type and Source ticket details.

Receive assets from inbound shipments at your stockroom in the Enterprise Asset Workspace

Receive enterprise and consumable assets from one or more shipments that are in transit to your stockroom in the Enterprise Asset Workspace. You can receive assets from shipments originating from any workflow.

Before you begin

Role required: sn_eam.asset_technician or sn_eam.enterprise_asset_manager

About this task

If you don't have the details of the assets you want to receive at your stockroom, you can view the list of assets that are on their way and then receive them. You can receive the complete quantity of consumables in the shipments, not a partial quantity.

Assets from an inbound shipment can be received under the following conditions:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The assets must have a serial number and an asset tag.
- The assets must be in the In-transit state and linked to a shipment record.
- Hardware assets can be received only if the Hardware Asset Management application is activated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom for which you want to receive hardware or consumable assets.
4. Select **Receive assets**.
5. In the Receive assets dialog box, select **View all inbound assets**.
   A list of all shipment assets currently on their way to the stockroom is displayed.

   The following details of a shipment are displayed:

   - **Asset**: Display name of the asset.
   - **Stage**: Stage of the shipment.

     Note: Only shipments that are In transit are displayed.

   - **Model categories**: Model grouping of the asset.
   - **Quantity**: Number of assets to be received.
   - **Asset tag**: Tag to track the asset.
   - **Serial number**: Serial number of the asset.
   - **Tracking number**: Identifier to track the shipment.
   - **Source**: Details of the source workflow including the request number through which you're receiving the asset. The source could be a transfer order line, a purchase order line, an RMA order line, or any other workflow through which the asset is received.
6. Select the shipment asset that you want to receive and then select **Receive**.

Result

If the asset details are valid, the following changes occur:

- The assets are received successfully.
- The State of the assets changes from **In transit** to **In stock**, and the Substate of the assets changes from **Reserved** to **Available**.
- The stockroom field on the asset form is automatically updated with the stockroom at which you received the assets.
- The Status of the shipment tasks associated with the assets changes to **Delivered**.
- The receive tasks in the source workflows are automatically closed.

If any of the asset details are invalid, an error message in shown in the **Alert** column for the corresponding asset record. You should resolve the error before receiving the assets.

Import and receive assets in bulk at your stockroom in the Enterprise Asset Workspace

Receive multiple enterprise and consumable assets at your stockroom by importing the asset records using an Excel template in the Enterprise Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sn_eam.enterprise_admin

About this task
This task enables you to receive assets with existing records, and also new assets, only if you have provided valid asset details in the template.

When you import a template with asset details, extensive validation is performed on each row. The records from the template and the validation results are stored in the Import asset row [sn_itam_cmn_import_asset_row] table.

Note: The *sn_itam_common.receive_assets_batch_size* system property determines how many asset records are processed at once when logging imports and receiving jobs. By default, the system handles 1,000 asset records per batch. With the admin role, you can adjust this number to optimize the system performance and handle large volume of assets. This system property supports domain separation by using the application property.

The asset data validation takes care of the following points:

- Child assets can't be received.
- Hardware assets can only be received if the Hardware Asset Management application is activated.
- Operational Technology (OT) assets can only be received if the OT Asset Management application is activated.
- Assets can be received only if the following conditions are fulfilled:
  - The required fields are provided.
  - The asset quantity is valid.
  - The Source type and Source ticket details are valid.
- Asset from purchase order lines can be received only in Zurich and later releases.
- Asset bundles can't be received.

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. Select the stockroom for which you want to receive hardware or consumable assets.
4. Select **Import receiving log**.
5. Prepare the asset data for import, and then proceed with the import.

   a. Download, update, and save the asset import template.

      i. Select **Download Template**.

      ii. Fill in the template with the details of the assets that you want to import and receive.

      The template has the following columns:

      - **Asset tag** and **Serial number**: These fields are used to determine whether the asset record exists in your ServiceNow instance or not.
      - **Model category**, **Model name**, and **Model number**: The fields required to validate an asset record depend on the model category. For example, a serial number is required for the Computer model category, and you can receive assets of that model category only

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

if the serial number is provided. Additionally, if an asset record isn't found, fields related to the model are required to create one using the Asset tag and Serial number values provided in the template.

- **Quantity**: This field should have a value of 1 for enterprise assets, and for consumables, it should reflect the number of assets you're receiving. You can't receive a partial quantity of consumables.
- **Manufacturer**: Asset manufacturer.
- **Source type**: The source type is the workflow through which you're receiving the asset. You should enter values that correspond to the workflows, such as the following:
  - `TOL` for transfer order line
  - `POL` for purchase order line
  - `RMAL` for Return Merchandise Authorization (RMA)

  Note: This field is required for a consumable asset so that the correct asset is identified and received.

- **Source ticket**: The request number of the source workflow that's associated with the asset that you want to receive, such as TO line number, PO line number, or RMA line number.

  Note: This field is required for a consumable asset so that the correct asset is identified and received.

- **Reserved for**
- **Parent asset**
- **MAC address** and **OT entity**: These fields are required to identify and receive OT assets.

iii. Save the template.

b. On the Create New Import asset data form, fill in the details.

i. In the **Name** field, provide a name for the asset import record.

ii. Select **Attach file** and then select the asset import template that you created in step a.

c. Select **Import**.

- The **Import asset data rows** tab is displayed, showing all the asset record rows that were imported through the Excel template.

  Note: Depending on the number of records being processed, it might take some time for the asset records to appear in the Import Asset Data Rows tab.

- The **Status** column indicates whether the asset is ready to be received. Here are the possible values:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **Ready to receive**: This status indicates that the asset data is valid and ready to be received at your stockroom.
- **Receive error** (Asset not found): This error indicates that no asset records match the details you provided in the template. However, since the details are valid, asset records will be created when you proceed with the Receive action.
- **Import error**: This error is because of the invalid asset data provided in the asset import template, such as duplicate serial numbers or invalid quantity for hardware assets.

- The **Alert** column provides details about any errors and the steps that you should take to resolve them and successfully receive the asset.

Note: You can proceed to receive assets with a status of Ready to receive or Receive error.

For assets with a status of Import error, correct the data issues in your template and create a new import record to import the corrected template. You can then receive the assets.

6. Receive assets at your stockroom.
   a. Select the import data rows corresponding to the assets that you want to receive.
   b. Select **Receive**.

If you received the assets with Status Ready to receive, the following changes happen:

- The State of the assets changes from **In transit** to **In stock**, and the Substate of the assets changes from **Reserved** to **Available**.
- The **Stockroom** field on the asset form is automatically updated with the stockroom at which you received the assets.
- The receive tasks in the source workflows associated with the assets that you received are automatically closed.

If you received the assets with Status Receive error, the following changes happen:

- Asset records are created with State as **In stock** and Substate as **Available**.
- The **Stockroom** field on the asset form is automatically updated with the stockroom at which you received the assets.
- The receive task in the source workflow is automatically closed only if you provided the Source type and Source ticket details.

Manage stockrooms with inventory reports in the Enterprise Asset Workspace

Track and manage stockrooms efficiently by evaluating the inventory reports in the Enterprise Asset Workspace.

The inventory reports help you:

- Find replacement options or spare part availability for assets.
- Quickly identify shortages and align current demand in your stockroom with both current and incoming supply.
- Analyze the supply to meet open demand across all stockrooms or locations.

Identify suitable replacement options for assets in the Enterprise Asset Workspace

Use the Inventory availability report to determine suitable replacement options for your assets and their child components that are in use, in maintenance, pending repair, or defective. The

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

report also helps you to determine the quantity of available substitute models that can be used locally, moved through the distribution channels, and estimate the lead time for new purchases.

Before you begin

The Inventory availability report is available only for enterprise, consumable, and bundle assets that are in use, in maintenance, pending repair, or defective.

Service locations and distribution channels should be configured for the stockroom. If the asset's location is a service location of a stockroom, it automatically becomes the local stockroom. A location can have multiple local stockrooms if it is serviced by more than one stockroom. For more details, see Add a distribution channel to a stockroom in the Enterprise Asset Workspace and Add service locations to a stockroom in the Enterprise Asset Workspace.

Role required: sn_eam.enterprise_asset_technician or sn_eam.enterprise_asset_manager

About this task

The Inventory availability report helps you to identify the best sourcing option when sourcing parts for assets or its components that are in use and nearing the end of their life, defective, or pending repair. Additionally, you can check how much stock is currently available at a stockroom.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Enterprise asset estate**.
2. Select the asset for which you want to view the replacement assets available in the local and remote stockrooms.
3. Select the **Inventory availability** tab.

   The list displays the asset and any of its child assets, along with their linked models and any substitute models. The list includes the following details:

Inventory availability report

Field	Description
Asset	Display name of the asset.
Model	Model of the asset. **Note:** If there are any substitute models for the asset model, they're also displayed.
Asset type	Indicates whether the asset is the original asset or a substitute model asset. This field can have any of the following values: ○ **Original parent** for the actual parent asset. ○ **Original child** for the child of the original parent asset. ○ **Substitute parent** for the asset of the substitute model. ○ **Substitute child** for the child asset of the substitute model.
Local stockroom quantity	Quantity of assets that are in stock and available in the stockrooms that service the asset location.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If you select the quantity shown, you can view the full list of assets in your local stockroom that can be used as replacements. There can be multiple local stockrooms if more than one stockroom serves the same location.
Remote stockroom quantity	Quantity of assets that are in stock and available in the distribution channel stockrooms that are marked as inbound stockrooms to the current local stockroom. **Note:** If you select the quantity shown, you can view the full list of assets in your distribution channel stockrooms that can be used as replacements.
Purchase lead time	Average time in days it has taken from ordering to receiving replacement assets through new purchase orders.

Identify the supply and demand for models within a stockroom in the Enterprise Asset Workspace

Use the Supply vs Demand report to evaluate the available and incoming quantity of models in your stockroom and the requests for these models from different service locations. This report helps you determine if you have enough assets to meet the demand.

Before you begin

Role required: sn_eam.enterprise_asset_technician or sn_eam.enterprise_asset_manager

About this task

Supply refers to the assets that are currently in stock and those that are incoming at your stockroom. Demand refers to the requests for assets from different service locations that your stockroom services.

Note the following points about the Supply vs Demand report:

- Supply of an asset model to your stockroom includes:
  - In stock assets that are in the Available, Reserved, Pending transfer, and Pending install substate
  - Incoming transfer orders that are partially shipped, fully shipped, in transit, received, and delivered
  - Incoming purchase orders that are ordered
- Demand for an asset model includes:
  - Outgoing transfer orders that are in the Draft, Requested, and Shipment preparation stage
  - Asset requests
  - Refresh requests
  - Work order parts requests

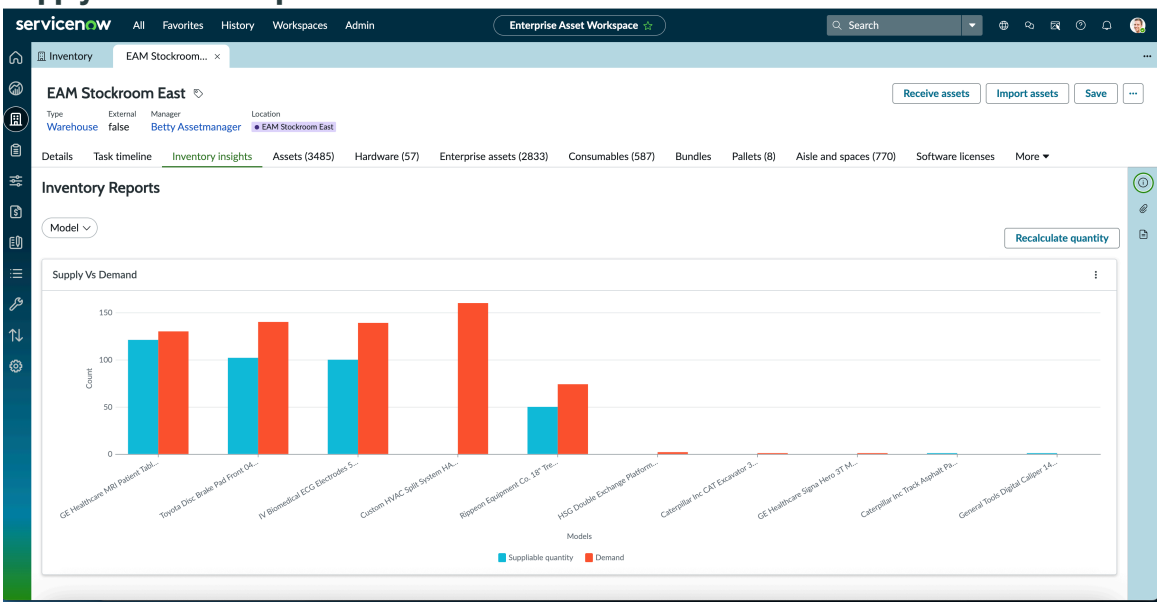
The supply and demand details are stored in the Model and stockrooms [sn_asset_model_and_stockroom] table. The *Populate model and stockroom data* scheduled job runs daily to populate this table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Inventory**.
2. Select the **All stockrooms** tab.
3. From the list of stockrooms, select the one for which you want to view the supply and demand details.
4. Select the **Inventory insights** tab.

Supply vs Demand report



The Supply vs Demand report shows the count on the y-axis and the model on the x-axis, with separate bars for supply and demand for each model. This visual representation helps you to compare the available quantity of each model in the stockroom with the number of requests from different service locations. By looking at the graph, you can determine which models have enough supply to meet demand and which ones need more stock.

Note: By default, the graph shows details for only 10 models.

5. View the details of the model that isn't shown on the report.
   a. Select the **Model** filter.
   b. Enter the model in the search field or select the model from the **Available** list.
   c. Move the selected model to the **Applied** list.
   d. Select **Apply**.
6. To further drill down into the supply or demand for a model and view its component-level details, select the corresponding bar.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The supply graph shows the count of the following:
  - **In stock assets**: Number of associated assets that are currently in the In stock state and Available, Reserved, Pending transfer, and Pending install substate within the given stockroom.
  - **Incoming transfer order**: Number of associated assets that are currently being transferred to the given stockroom. This number is based on the sum of the **Quantity remaining** field value for all associated transfer order lines.
  - **Incoming purchase order**: Number of associated assets that have been ordered but not yet delivered to the given stockroom. This number is based on the sum of the **Remaining quantity** field value for all associated purchase order lines.
- The demand graph shows the count of the following:
  - **Outgoing transfer order**: Number of associated assets that are currently being transferred from the given stockroom. This number is based on the sum of the **Quantity requested** field value for all associated transfer order lines.
  - **Asset requests**: Number of associated enterprise asset requests. This number is based on the sum of the **Quantity** field value for all associated request items.
  - **Refresh requests**: Number of associated enterprise asset refresh requests. TThis number is based on the sum of the **Quantity** field value for all associated request items.
  - **Work order parts requests**: Number of parts requests for associated work orders and work order tasks. This number is based on the sum of the **Quantity** field value for all associated request items.

By selecting the relevant bars, you can view the list of assets that make up the count.

7. **Optional:** To initiate the calculation of supply and demand for asset models manually, select **Recalculate quantity**.

   (Optional) The Supply vs Demand graph updates to show the recently calculated values.

Identify the supply for open demands in the Enterprise Asset Workspace

Use the Open demands report to determine available stock within local stockrooms and distribution channels to fulfill sourcing requests that are open.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Procurement**.
2. In the Procurement overview, select **Open demands**.

   The report displays the list of open demands with the following details:

   - Requests and Requested items.
   - The quantity of the requested model available in local stockrooms that serve the asset location.
   - The quantity of the requested model available in distribution channel stockrooms that serve the asset location.
   - The purchase lead time, which is the average time in days it has taken from ordering to receiving assets through new purchase orders.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. To view the current stock availability in the local stockrooms for all open requests for a model and determine if there is sufficient quantity, select the number shown in the **Local stockroom quantity** column.
   The available asset quantity is determined by the current state. If two requests from a service location, which is serviced by two or more stockrooms, are for the same model and the available quantity is 100, the report will show 100 available in the local stockroom for both requests. Once one request is fulfilled, the quantity will update to reflect the remaining amount for the other request.
4. To view the current stock availability in the distribution channel stockrooms for all open requests for a model and determine if there is sufficient quantity, select the number shown in the **Remote stockroom quantity** column.

Create and manage contracts for enterprise assets

Create contracts for your enterprise assets and manage them by taking actions on contracts that are nearing expiration or already expired.

You can take action on certain enterprise asset contracts that are either nearing their expiration or have already expired.

If a maintenance or warranty contract is expiring or has already expired, you can renew the contract by using the contract renewal workflow. For more information on renewing expiring maintenance and warranty contracts, see Contract renewal workflow.

If a lease contract is expiring or has already expired, you can choose to:

- return the associated enterprise assets to the asset vendor,
- buy out the associated enterprise assets so that you can permanently add them to your asset inventory,
- or extend the contract.

For more information on managing expiring lease contracts, see Managing expiring contracts for leased enterprise assets.

Create a contract for your leased enterprise assets

Create a contract to define the lease details of your enterprise assets.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

About this task

The following steps describe how to create contracts for leased enterprise assets only. For information on how to create other types of contracts, see Contract Management.

Procedure

1. From the Enterprise Asset Workspace, open the Contract and lease management view.
2. On the **Lease contracts** tab, select **New**.
3. On the Create New Contract form, fill in the fields.
   See Contract fields for Enterprise Asset Management for a detailed description of each field.
4. Select **Save**.
   A new contract record is created for the lease contract.
5. Build terms and conditions for the lease contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you can build terms and conditions for a lease contract, you must create a terms and conditions record and add it to the contract. For detailed instructions on how to create a terms and conditions record, see Create a terms and conditions record. For detailed instructions on how to add a terms and conditions record to a contract, see Add terms and conditions to a contract.

a. On the lease contract record header, select the More Actions icon ••• .

b. When prompted, select **Build Terms and Conditions**.
The terms and conditions are built for the lease contract and added to the **Contract History** tab of the lease contract record. On the **Contract History** tab, you can select the date in the **Contract Starts** field to view the complete terms and conditions for the lease contract.

6. Add all enterprise assets that are covered by the lease contract.

> **Note:** If you created a multi-component asset from a multi-component model, only the parent asset can be added to the lease contract. The associated child assets cannot be added to the lease contract. See Multi-component models and assets in Enterprise Asset Management for more information on multi-component assets.

a. On the **Assets Covered** tab of the lease contract record, select **Add**.
The Add assets dialog box opens.

b. In the dialog box, select the check box for each enterprise asset that is covered by the lease contract.

> **Note:** The dialog box displays only the enterprise assets that are not already covered by another active lease contract.

c. Select **Add**.
The dialog box closes and the **Assets Covered** tab automatically reloads with the list of all enterprise assets that you added.

7. Create expense lines to track the cost of each enterprise asset that is covered by the lease contract.

a. On the **Expense Lines** tab of the lease contract record, select **New**.

b. On the Create New Expense Line form, fill in the fields.

See Expense line fields for Enterprise Asset Management for a detailed description of each field.

c. Select **Save**.
A new expense line record is created for the selected enterprise asset.

d. Close the expense line record to return to the **Expense Lines** tab of the lease contract record.

e. Repeat steps a to d for each expense line that you want to create.

8. Create child contracts that you want to associate with the lease contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the **Child Contracts** tab of the lease contract record, select **New**.

b. In the **Contract model** field of the Create New Contract form, search for and select the type of contract that you want to create.

c. Configure the child contract by following the same steps that you used to configure the lease contract (steps 3 to 7).

d. Select **Submit For Review**.
A review notification is sent to the user that you specified in the **Approver** field of the child contract record. After reviewing the child contract, the user can either approve or reject it.

e. Repeat steps a to d for every child contract that you want to create.

9. Select **Submit For Review**.
A review notification is sent to the user that you specified in the **Approver** field of the lease contract record. After reviewing the lease contract, the user can either approve or reject it.

Managing expiring contracts for leased enterprise assets

You can use the Contract and lease management view to track and take action on leased enterprise assets that are nearing the end of their contracts. You can choose to return your leased enterprise assets, buy out your leased enterprise assets, or extend your lease contracts.

Lease management flow

When a lease contract for a given enterprise asset is nearing its expiration, the Enterprise Asset Management application automatically sends out a notification informing you that the contract will be expiring soon. You can customize the timing, content, and recipients of this expiry notification by navigating to **System Notification** > **Email** > **Notifications** and then selecting **Contract Threshold breached** from the list of available email notifications.

After you receive an expiry notification for one of your lease contracts, you can begin the lease-end process for that contract.

Note: You can begin the lease-end process only for active lease contracts that are expiring within 90 days but do not have a **Substate** of **Expiring**. A **Substate** of **Expiring** indicates that the lease-end process for that contract has already begun.

When the lease-end process begins, the Enterprise Asset Management application automatically generates a Planning task that you must complete to specify what action you want to take on either the associated enterprise asset or the lease contract itself. You can choose to

- return the enterprise asset to the asset vendor,
- buy out the enterprise asset so that you can permanently add it to your asset inventory,
- or extend the lease contract.

Based on the action that you select, you must then perform all subsequent tasks to complete the lease-end process and move the lease contract out of the expiring substate.

Begin the lease-end process for an expiring enterprise asset lease contract

Initiate the lease-end process for an expiring enterprise asset lease contract so that you can return the associated enterprise asset, buy out the associated enterprise asset, or extend the lease contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Important: You can begin the lease-end process only for active lease contracts that are expiring within 90 days but do not have a **Substate** of **Expiring**. A **Substate** of **Expiring** indicates that the lease-end process for that contract has already begun.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Contract and lease management view.
2. On the **Lease contracts** tab, select the lease contract for the enterprise asset that you want to return, buy out, or extend the contract for.
   The lease contract record opens.
3. On the lease contract record header, select **Begin lease-end process**.
4. When prompted to confirm that you want to begin the lease-end process for the contract, select **OK**.

Result

The lease-end process for the specified lease contract begins. The Enterprise Asset Management application then automatically generates a Planning task for the lease contract.

What to do next

Complete the Planning task for the lease contract so that you can specify what action you want to take on either the associated enterprise asset or the lease contract itself. See Complete the Planning task for an expiring enterprise asset lease contract for detailed instructions.

Complete the Planning task for an expiring enterprise asset lease contract

Complete the Planning task for an expiring enterprise asset lease contract so that you can proceed with either returning the associated enterprise asset, buying out the associated enterprise asset, or extending the lease contract.

Before you begin

To generate the Planning task for an expiring lease contract, you must initiate the lease-end process for that contract. See Begin the lease-end process for an expiring enterprise asset lease contract for detailed instructions.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Contract and lease management view.
2. On the **Lease-end assets** tab, select the lease contract for the enterprise asset that you want to return, buy out, or extend the contract for.

   Note: You must select a lease contract that is in the **Planning** stage.

   The lease contract record opens.
3. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Planning** task.

   Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

   The Planning task opens.
4. On the **Details** tab of the Planning task, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details tab

Field	Description
Contract Asset Task	
Number	Task number used to identify and track the Planning task. This field populates automatically.
Contract	Lease contract that the task is associated with. This field populates automatically.
Asset	Enterprise asset that is associated with the lease contract. This field populates automatically.
Location	Current location of the associated enterprise asset. This field populates automatically.
Lease action	Action that you want to take on the associated enterprise asset. Select one of the following options: ○ **Return** ○ **Extend** **Note:** If you select this option, the Enterprise Asset Management application automatically creates a purchase order and purchase order line for the lease contract extension. ○ **Buyout** **Note:** If you select this option, the Enterprise Asset Management application automatically creates a purchase order and purchase order line for the enterprise asset buyout.
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

Result
The Planning task automatically closes with an updated state of Closed Complete.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

Based on the action that you selected in the **Lease action** field, complete all necessary tasks to return the associated enterprise asset, buy out the associated enterprise asset, or extend the lease contract.

Return a leased enterprise asset

Return a leased enterprise asset to the asset vendor before the corresponding lease contract expires.

Before you begin

Before you can proceed with returning a leased enterprise asset, you must complete the Planning task for the associated lease contract. See Complete the Planning task for an expiring enterprise asset lease contract for detailed instructions.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Note: The sn_eam.enterprise_asset_technician role can also perform the Collection, Preparation, and Shipment tasks. However, this role can perform these tasks only through the **Lease-end tasks** Quick links card that is available on the Enterprise asset overview.

Procedure

1. From the Enterprise Asset Workspace, open the Contract and lease management view.
2. On the **Lease-end assets** tab, select the lease contract for the enterprise asset that you want to return.
   The lease contract record opens.
3. Complete and close the Collection task for the lease contract.
   To successfully complete and close this task, you must collect the enterprise asset that you want to return.

   a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Collection** task.

      Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

      The Collection task opens.

   b. On the **Details** tab of the Collection task, fill in the fields.

Details tab

Field	Description
Contract Asset Task	
Number	Task number that is used to identify and track the Collection task. This field populates automatically.
Contract	Lease contract that the task is associated with. This field populates automatically.
Asset	Enterprise asset that is associated with the lease contract. This field populates automatically.
Location	Current location of the associated enterprise asset. This field populates automatically.
State	State of the task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Asset collection	
Asset collected	Option that indicates if the associated enterprise asset was collected for return. If you select **Yes**, the **Stockroom** field appears next to the **Asset collected** field. In the **Stockroom** field, search for and select the stockroom that the associated enterprise asset was collected from. If you select **No**, the **Action change** field appears next to the **Asset collected** field. In the **Action change** field, select an option to change your lease action to either an enterprise asset buyout or lease contract extension.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.
The Collection task automatically closes with an updated state of Closed Complete.

If you set the **Asset collected** field to **Yes**, the **Substate** field changes to **Pending transfer** in the asset record for the associated enterprise asset.

If you set the **Asset collected** field to **No**, proceed with one of the following options:

- If you changed your lease action to an enterprise asset buyout, proceed to Buy out a leased enterprise asset.
- If you changed your lease action to a lease contract extension, proceed to Extend the lease contract for an enterprise asset.

4. Complete and close the Preparation task for the lease contract.
To successfully complete and close this task, you must prepare the enterprise asset for return.

a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Preparation** task.

Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

The Preparation task opens.

b. On the **Details** tab of the Preparation task, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details tab

Field	Description
Contract Asset Task	
Number	Task number that is used to identify and track the Preparation task. This field populates automatically.
Contract	Lease contract that the task is associated with. This field populates automatically.
Asset	Enterprise asset that is associated with the lease contract. This field populates automatically.
Location	Current location of the associated enterprise asset. This field populates automatically.
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.
The Preparation task automatically closes with an updated state of Closed Complete.

5. Complete and close the Shipment task for the lease contract.
To successfully complete and close this task, you must ship the enterprise asset back to the asset vendor.

a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Shipment** task.

Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

The Shipment task opens.

b. On the **Details** tab of the Shipment task, fill in the fields.

Details tab

Field	Description
Contract Asset Task	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Number	Task number that is used to identify and track the Shipment task. This field populates automatically.
Contract	Lease contract that the task is associated with. This field populates automatically.
Asset	Enterprise asset that is associated with the lease contract. This field populates automatically.
Location	Current location of the associated enterprise asset. This field populates automatically.
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Shipment	
Carrier	Shipping carrier through which you shipped the associated enterprise asset.
Ship date	Date on which you shipped the associated enterprise asset.
Tracking number	Tracking number that enables you to track the status and location of the shipment.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.
The Shipment task automatically closes with an updated state of Closed Complete.

In the asset record for the associated enterprise asset, the **State** field changes to **In transit**.

6. Complete and close the Return confirmation task for the lease contract.
To successfully complete and close this task, the asset vendor must confirm if they received the enterprise asset that you returned. The asset vendor must also inform you of any settlement payouts that you are receiving for the returned enterprise asset.

a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Return confirmation** task.

Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

The Return confirmation task opens.

b. On the **Details** tab of the Return confirmation task, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details tab

Field	Description
Contract Asset Task	
Number	Task number that is used to identify and track the Return confirmation task. This field populates automatically.
Contract	Lease contract that the task is associated with. This field populates automatically.
Asset	Enterprise asset that is associated with the lease contract. This field populates automatically.
Location	Current location of the associated enterprise asset. This field populates automatically.
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Return details	
Return confirmation	Option that indicates if the associated enterprise asset was returned successfully. To complete the Return confirmation task, you must set this field to **Yes**.
Settlement	Option that indicates if you are receiving a settlement payout for the enterprise asset that you returned. If you select **Yes**, the **Settlement amount** field appears below the **Settlement** field. In the **Settlement amount** field, enter the total amount of money that you are receiving from the settlement payout. The Enterprise Asset Management application can then use this information to automatically create a purchase order and purchase order line for the settlement payout. **Note:** You can set the **Settlement amount** field to any currency of your choice.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.
The Return confirmation task automatically closes with an updated state of Closed Complete.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. If you set the **Settlement** field to **Yes** in the Return confirmation task, complete and close the corresponding Return settlement task.
   To successfully complete and close this task, the asset vendor must reimburse you the amount that was specified in the settlement payout.

   a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Return settlement** task.

      Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

      The Return settlement task opens.

      Note: Aside from the **State** field, all editable fields in the Return settlement task are pre-populated based on the corresponding fields that you filled out in the Return confirmation task. The **Purchase order** and **Purchase order line** fields are pre-populated with the purchase order and purchase order line that the Enterprise Asset Management application automatically created for the settlement payout in step 7.

   b. In the Return details section of the **Details** tab, select the Open Record icon (ⓘ) in the **Purchase order** field.
      The purchase order record opens.

   c. Select **Order**.

   d. After the page reloads, select **Receive**.
      The form closes and you automatically return to the purchase order record, which now has a status of Received.

   e. Close the purchase order record to return to the Return settlement task.

   f. Select **Close Task**.
      The Return settlement task automatically closes with an updated state of Closed Complete.

Result

After you successfully return the leased enterprise asset, the **State** and **Substate** fields change to **Retired** and **Lease Return** in the corresponding asset record.

Buy out a leased enterprise asset

Buy out a leased enterprise asset before the corresponding lease contract expires.

Before you begin

Before you can proceed with buying out a leased enterprise asset, you must complete the Planning task for the associated lease contract. See Complete the Planning task for an expiring enterprise asset lease contract for detailed instructions.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Contract and lease management view.
2. On the **Lease-end assets** tab, select the lease contract for the enterprise asset that you want to buy out.
   The lease contract record opens.
3. Complete and close the Buyout task for the lease contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To successfully complete and close this task, you must confirm a buyout date and amount with the asset vendor.

a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Buyout** task.

   Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

   The Buyout task opens.

b. On the **Details** tab of the Buyout task, fill in the fields.

Details tab

Field	Description
Contract Asset Task	
Number	Task number that is used to identify and track the Buyout task. This field populates automatically.
Contract	Lease contract that the task is associated with. This field populates automatically.
Asset	Enterprise asset that is associated with the lease contract. This field populates automatically.
Location	Current location of the associated enterprise asset. This field populates automatically.
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Buyout details	
Buyout date	Date on which you are buying out the associated enterprise asset.
Buyout amount	Cost to buy out the associated enterprise asset. **Note:** You can set this field to any currency of your choice.
Notes	
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.
   The Buyout task automatically closes with an updated state of Closed Complete.

4. Complete and close the Buyout confirmation task for the lease contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To successfully complete and close this task, you must pay the asset vendor the confirmed buyout amount on or before the confirmed buyout date.

a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Buyout confirmation** task.

   Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

   The Buyout confirmation task opens.

   Note: Aside from the **State** field and the additional **Buyout confirmation** field, all editable fields in the Buyout confirmation task are pre-populated based on the corresponding fields that you filled out in the Buyout task. The **Purchase order** and **Purchase order line** fields are pre-populated with the purchase order and purchase order line that the Enterprise Asset Management application automatically created for the enterprise asset buyout in the Planning task.

b. In the Buyout details section of the **Details** tab, set the **Buyout confirmation** field to **Yes**.
   This field indicates if you bought out the enterprise asset successfully.

c. In the same section, select the Open Record icon in the **Purchase order** field.
   The purchase order record opens.

d. Select **Order**.

e. After the page reloads, select **Receive**.
   The form closes and you automatically return to the purchase order record, which now has a status of Received.

f. Close the purchase order record to return to the Buyout confirmation task.

g. On the Buyout confirmation task, select **Close Task**.
   The Buyout confirmation task automatically closes with an updated state of Closed Complete.

Result

After you successfully buy out the enterprise asset, the **Date removed** field on the lease contract record automatically updates with the date on which you completed all buyout tasks. Following this date, you can no longer track the enterprise asset through this lease contract record.

Extend the lease contract for an enterprise asset

Extend the lease contract for an enterprise asset before it expires.

Before you begin

Before you can proceed with extending a lease contract, you must complete the associated Planning task. See Complete the Planning task for an expiring enterprise asset lease contract for detailed instructions.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Contract and lease management view.
2. On the **Lease-end assets** tab, select the lease contract that you want to extend.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The lease contract record opens.

3. Complete and close the Extension task for the lease contract.
   To successfully complete and close this task, you must confirm the lease contract extension details with the asset vendor. These details include the start date, end date, and cost of the lease contract extension.

   a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Extension** task.

      Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

      The Extension task opens.

   b. On the **Details** tab of the Extension task, fill in the fields.

Details tab

Field	Description
Contract Asset Task	
Number	Task number that is used to identify and track the Extension task. This field populates automatically.
Contract	Lease contract that the task is associated with. This field populates automatically.
Asset	Enterprise asset that is associated with the lease contract. This field populates automatically.
Location	Current location of the associated enterprise asset. This field populates automatically.
State	State of the task.
Assignment group	Group to which the task is assigned.
Assigned to	User to which the task is assigned.
Work notes list	Users who receive notifications when work notes are added to the task.
Short description	Brief description of the task.
Description	Detailed description of the task.
Extension details	
Extension start date	Date on which you want to start the lease contract extension.
Extension end date	Date on which you want to end the lease contract extension.
Extension cost	Cost to extend the lease contract. **Note:** You can set this field to any currency of your choice.
Notes	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Work notes	Notes about the task that are visible to all users within your organization.

c. Select **Close Task**.
The Extension task automatically closes with an updated state of Closed Complete.

4. Complete and close the Extension confirmation task for the lease contract.
To successfully complete and close this task, you must pay the asset vendor the amount that was specified in the extension cost.

a. On the **Contract Asset Tasks** tab of the lease contract record, select the task number for the **Extension confirmation** task.

Alternatively, select the task number that is displayed in the **Current task** field of the lease contract record header.

The Extension confirmation task opens.

Note: Aside from the **State** field and the additional **Extension confirmation** field, all editable fields in the Extension confirmation task are pre-populated based on the corresponding fields that you filled out in the Extension task. The **Purchase order** and **Purchase order line** fields are pre-populated with the purchase order and purchase order line that the Enterprise Asset Management application automatically created for the lease contract extension in the Planning task.

b. In the Extension details section of the **Details** tab, set the **Extension confirmation** field to **Yes**.
This field indicates if the lease contract was extended successfully.

c. In the same section, select the Open Record icon (ⓘ) in the **Purchase order** field.
The purchase order record opens.

d. Select **Order**.

e. After the page reloads, select **Receive**.
The form closes and you automatically return to the purchase order record, which now has a status of Received.

f. Close the purchase order record to return to the Extension confirmation task.

g. On the Extension confirmation task, select **Close Task**.
The Extension confirmation task automatically closes with an updated state of Closed Complete.

Result

After you successfully extend the lease contract, the **Expiration** field on the lease contract record changes to **Expired**. The Enterprise Asset Management application then creates a new record for the extended lease contract, which is named **EXT_<*expired-lease-contract*>**. The new lease contract record covers all of the same enterprise assets that were covered in the original lease contract record.

Managing work orders for your enterprise assets

Create and manage work orders for your enterprise assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Overview of managing work orders

Create and manage work orders for your enterprise assets by performing the following tasks.

Task	Resource
Create a work plan for your enterprise assets	Create a work plan for your enterprise assets
Create a maintenance plan for your enterprise assets	Create a maintenance plan for your enterprise assets
Create a work order for your enterprise assets	Create a work order for an enterprise asset
Manage work through work orders and work tasks for your enterprise assets	Managing work for your enterprise assets
Create templates for your enterprise assets	Create a template for your Enterprise Asset Management work orders
Use Drop off tasks to manage delivery of your enterprise assets	Delivering enterprise assets in your personal stockroom through Drop off tasks

Create a work plan for your enterprise assets

Create and manage work plans to specify how and when the work should be performed for any activity.

About this task

To create work plans from within the Enterprise Asset Workspace, install the Planned Work Management (sn_fsm_planned_wm) application from the ServiceNow Store. Work plans enable managers to create work orders and allocate them to technicians so that the technicians can review and plan their work accordingly.

A work plan consists of an effective start and end date that determines the period for which the plan can be scheduled for execution. Each work plan must have at least one or more records associated with it for which you want to apply the work plan.

Before you begin

Role required: sn_fsm_planned_wm.planned_work_admin

Procedure

1. From the Enterprise Asset Workspace, open the Work management view.
2. On the **Maintenance plans** tab, select **New** to open the *`Select target asset table`* pop-up window.
3. Select **Work plan** from the **Plan type** list.
4. Select a table from the **Asset table** list.
   The Enterprise asset table is selected by default.
5. Select **Create**.
6. On the Create New Work Plan page, fill in the details.
   For a detailed description of all the work plan fields, see Work plan fields for Enterprise Asset Management.
7. Select **Save**.

   The page closes and you're automatically redirected to the new work plan record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can further configure your work plan by creating planned work schedules, planned work records, and work orders.

You can view all your work plan records in the list view in the **Maintenance plans** tab. Every work plan record is prefixed with **WP**.

Create a planned work schedule for your work plan

Create a planned work schedule to specify when you want the work plan to run and how frequently the schedule should run. You can apply one or more planned work schedules to a single work plan.

Before you begin

Before you create a planned work schedule, ensure that you have created a work plan.

Role required: sn_fsm_planned_wm.planned_work_admin

Procedure

1. On the **Planned Work Schedules** tab of the work plan record, select **New**.
2. On the Create New Planned Work Schedule form, fill in the fields.

   For a detailed description of the planned work schedule fields, see Work plan schedule fields for Enterprise Asset Management.

3. Select **Save**.
   The form closes and you're automatically redirected to the new planned work order schedule record.
4. Select the **More Actions** ellipsis icon and then select **Associate schedule with filtered records** to associate the schedule with the assets that the work plan is applied to.
   A confirmation message appears, indicating that the enterprise assets are now associated with the planned work plan schedule. You can verify that the association is successful using the **Planned Work Records** tab on either the planned work plan schedule record or the work plan record.
5. Apply a planned work schedule template to the work plan schedule.
   Planned work schedule templates enable the Enterprise Asset Management application to automatically populate information, generate appropriate requests and tasks, and create part requirements for your work plans each time the planned work schedule runs.

   a. On the **Planned Work Schedule Templates** tab of the work plan schedule record, select **New**.

      The Create New Planned Work Schedule Template form opens.

   b. On the form, fill in the fields.

Create New Planned Work Schedule Template form

Field	Description
Model	Model of the work order template.
Schedule	Planned work schedule to which you're applying the work order template. This field populates automatically.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Table	Table that is associated with the corresponding work plan of this planned schedule. This field is automatically set to the table name selected for the work plan.
Conditions	Filter conditions to determine the work order template to be used to create work orders based on the planned schedule.
Notes	Any work notes regarding the template.

c. Select **Save**.

d. Close the form to return to the planned work plan schedule record.

6. On the planned work plan schedule record, select the **More Actions** ellipsis icon and then select **Run on demand** to create work orders for each asset.
Work orders are created for each asset. You can view the work orders in the **Work Orders** tab.

Create a maintenance plan for your enterprise assets

Create a maintenance plan to manage and schedule routine maintenance for your enterprise assets, linear assets, and linear segments. You can run maintenance on-demand or based on a set of specific criteria.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Work management view.
2. On the **Maintenance plans** tab, select **New**.
3. Select **Maintenance plan** from the **Plan type** list.
4. Select a table from the **Asset table** list.
The Enterprise asset table is selected by default.
5. Select **Create**.
6. On the Create New Maintenance Plan page, fill in the details.
For a detailed description of all the maintenance plan fields, see Maintenance plan fields for Enterprise Asset Management.
7. Select **Save**.

   The page closes and you're automatically redirected to the new maintenance plan record.

   You can further configure your maintenance plan by creating maintenance schedules, work orders, and work order tasks. You can view all your maintenance plan records in the list view in the **Maintenance plans** tab. Every maintenance plan record is prefixed with **MP**.

Create a maintenance schedule

Create a maintenance schedule to specify when you want the maintenance to run using criteria such as time intervals or field values and apply a work order template to the schedule. You can apply one or more maintenance schedules to a single maintenance plan.

Before you begin

Role required: sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. On the **Maintenance Schedules** tab of the maintenance plan record, select **New**.
2. On the Create new Maintenance Schedule form, fill in the fields.

   See Maintenance schedule fields for Enterprise Asset Management for a detailed description of each field.

3. Select **Save**.
   The form closes and you're automatically redirected to the new maintenance schedule record.
4. Apply a work order template to the maintenance schedule.
   Work order templates enable the Enterprise Asset Management application to automatically populate information, generate appropriate requests and tasks, and create part requirements for your work orders each time the scheduled maintenance runs.

   a. On the **Schedule Templates** tab of the maintenance schedule record, select **New**.

      The Create New Schedule Template form opens.

   b. On the form, fill in the fields.

   Create New Schedule Template form

Field	Description
Model	Model of the work order template.
Schedule	Maintenance schedule to which you're applying the work order template. This field populates automatically.

   c. Select **Save**.

   d. Close the form to return to the maintenance schedule record.
5. On the maintenance schedule record, select the **More Options** ellipsis icon and then select **Associate records** to associate the maintenance schedule with the enterprise assets that the maintenance plan is applied to.
   A confirmation message appears, indicating that the enterprise assets are now associated with the maintenance schedule. You can verify that the association is successful using the **Maintenance Plan Records** tab on either the maintenance schedule record or maintenance plan record.

Result

Maintenance runs automatically based on the schedule that you set for the maintenance plan. You can also run maintenance on-demand by selecting **Run on demand** on the maintenance schedule record.

Each time maintenance runs, the Enterprise Asset Management application automatically creates a corresponding work order for every enterprise asset that the maintenance plan is applied to, given that the asset isn't already associated with an existing work order. You can use these work orders to track and manage all the work that you need to perform on the specified enterprise assets. See Managing work for your enterprise assets for more information on work orders.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a work order for an enterprise asset

Create a work order to track and manage work for an enterprise asset, linear asset, linear segment, or asset group.

Before you begin

Role required: sn_eam.enterprise_asset_manager

About this task

Note: Starting with Enterprise Asset Management version 10.0, work orders can be created for asset groups, enabling technicians to execute a single work order for an entire group of related assets.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. On the **Work orders** tab, select **New**.

   Note:

   If you created a maintenance plan to manage and schedule maintenance for your enterprise assets, the Enterprise Asset Management application automatically creates a corresponding work order for each asset to which the maintenance plan is applied.

   For more information on maintenance plans, see Create a maintenance plan for your enterprise assets.

3. On the form, fill in the fields.

Create New Work Order form

Field	Description
Work Order	
Company	Company that you are creating the work order for.
Contract	Contract that defines the lease details of the associated enterprise asset.
Asset	Asset that you want to manage work for through this work order. Starting with Enterprise Asset Management version 10.0, you can select an asset group. **Note:** You can also select linear assets and linear segments from this field.
Location	Current location of the associated enterprise asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If you select a linear asset, a pencil icon appears to enable you to choose the work order location between the Start marker and End marker. To select a location, follow these steps: **a.** Select the Work order linear asset location icon . A Map location form appears, showing the start and the end markers on the map. **b.** Select a location on the map between the start and end markers. **c.** In the **Name** field, enter the name for the work order location. **d.** Select **Submit**.
Start marker	Start point of the linear asset or the linear segment. **Note:** This field only appears if you select Linear asset or linear segment from the **Asset** field.
End marker	End point of the linear asset or the linear segment. **Note:** This field only appears if you select linear asset or linear segment from the **Asset** field.
Priority	Priority of the work order.
Template	Work order template that you want to apply to this work order. Work order templates enable you to automatically populate information, generate appropriate tasks, and create part requirements for your work orders. See Create a template for your Enterprise Asset Management work orders for more information on work order templates. To apply a template to a work order in the draft state and view the work order tasks and part requirements generated from the template, the sn_eam.enterprise_asset_manager role must ensure that the **Apply Work Order template in draft status** field in the Field Service Management application is enabled. To accomplish this, navigate to **All** > **Field Service** > **Administration** > **Configuration** and enable the **Apply Work Order template in draft status** field in the **Business Process** tab.
Closed	Date and time at which the work order is closed and complete.
Short description	Brief description of the work order.
Description	Detailed description of the work order.
Work notes	Notes about the work order that are visible to all users within your organization.
Scheduling	
Due by	Date and time at which the work order must be completed.

4. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The work order is created in the Draft state.
- Work order tasks and parts requirements associated with the work order automatically appear on the **Work Order Tasks** and the **Part Requirements** tabs.
- Assets associated with the work order are listed on the **Affected assets** tab. If you selected an asset group, assets from parent asset groups and subgroups are also listed.

5. To add additional work order tasks, select **New** in the **Work Order Tasks** tab.
   See Create a work order task for an Enterprise Asset Management work order for detailed instructions.
6. To track all items that you must complete for your work order or an associated work order task, create a checklist.
   See Create a checklist for an Enterprise Asset Management work order or work order task for detailed instructions.
7. If the enterprise asset that is associated with your work order is missing a required asset or part, create a part requirement.
   See Create a part requirement for an Enterprise Asset Management work order or work order task for detailed instructions.
8. Specify any upstream or downstream task dependencies for the associated work order tasks.
   See Create dependencies for an Enterprise Asset Management work order task for detailed instructions.
9. Select **Ready to Work** to initiate work for the given work order

What to do next
Work with the assigned agent to complete and close all subsequent tasks for your work order.

Create a work order task for an Enterprise Asset Management work order

Create a work order task to track and manage an individual task for your Enterprise Asset Management work order.

Before you begin
Role required: wm_agent

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. On the **Work orders** tab, select the work order to which you want to add a work order task.
   The work order record opens.
3. Select the **Work Order Tasks** tab and select **New**.
4. On the Create New Work Order Task form, fill in the fields.

Create New Work Order Task

Field	Description
Work Order Task	
Assignment group	Agent group to which the work order task is assigned.
Assigned to	Agent to whom the work order task is assigned.
Work type	Type of work that the assigned agent must perform on the associated enterprise asset. The options are **Break Fix**, **Install**, **Planned Maintenance**, **Asset condition**, **Shutdown**, **Startup**, and **Calibration**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Asset	Enterprise asset that the assigned agent is performing work on. This field populates automatically.
Location	Current location of the associated enterprise asset. This field populates automatically. **Note:** If you select a linear asset, the Work order linear asset location icon appears to enable you to choose the work order location between the Start marker and End marker. To select a location, follow these steps: **a.** Select the pencil icon . A Map location form appears, showing the start and the end markers on the map. **b.** Select a location on the map between the start and end markers. **c.** In the **Name** field, enter the name for the work order location. **d.** Select **Submit**.
Start marker	Start point of the linear asset or the linear asset. **Note:** This field only appears if you select Linear asset or linear segment from the **Asset** field.
End marker	End point of the linear asset or the linear segment. **Note:** This field only appears if you select linear asset or linear segment from the **Asset** field.
Short description	Brief description of the work order task.
Description	Detailed description of the work order task.
Work notes	Notes about the work order task that are visible to all users within your organization.
Scheduling	
Window start	Estimated start date and time of the work order task.
Window end	Estimated completion date and time of the work order task.
Estimated work duration	Amount of time that you estimate it will take to complete the work order task.
Actual work start	Actual start date and time of the work order task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Actual work end	Actual completion date and time of the work order task.

5. Select **Save**.

Result

- The work order task is created in the **Draft** state.
- Assets associated with the work order are added to the work order task and listed on the **Affected assets** tab.

Create a checklist for an Enterprise Asset Management work order or work order task

Create a checklist of all items that you must complete for your work order or work order task.

Before you begin

Role required: sn_eam.enterprise_asset_manager or wm_agent

Procedure

1. From the Enterprise Asset Workspace, open the Work management view.
2. Open the record for either the work order or work order task that you want to create a checklist for.
   - To open a work order record, select the **Work orders** tab. From the list of available work orders, select the work order that you want to create a checklist for.
   - To open a work order task record, select the **Work order tasks** tab. From the list of available work order tasks, select the work order task that you want to create a checklist for.
3. On the work order or work order task record, select the **Checklist items** tab.
4. Use one of the following options to create a checklist.
   - Create a checklist by adding individual checklist items:
     a. Select **New**.
     b. On the Create New Checklist Item form, fill in the fields.

Create New Checklist Item form

Field	Description
Name	Name of the checklist item.
Order	Order in which you must complete the checklist item. For example, a value of 1 indicates that the given checklist item is the first item you must complete within your checklist.
Checklist	Checklist that the checklist item is included in.
Complete	Option that indicates if the checklist item has been completed.

     c. Select **Save**.
     d. Repeat steps a to c for every checklist item that you want to add to your checklist.
   - Create a checklist by applying a checklist template:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select **Apply template**.

   The Apply Template dialog box opens.

b. In the dialog box, select the checklist template that you want to apply to your work order or work order task.

c. Select **OK**.

   The dialog box closes and you return to the **Checklist items** tab.

d. Select the Refresh List icon to populate the list of checklist items that were added based on the selected checklist template.

Create a part requirement for an Enterprise Asset Management work order or work order task

If the enterprise asset that is associated with your work order or work order task is missing a required asset or part, create a part requirement to track and verify the missing asset or part.

Before you begin

Role required: sn_eam.enterprise_asset_manager or wm_agent

Note: You can use the wm_agent role to create part requirements only for assigned work order tasks.

Procedure

1. From the Enterprise Asset Workspace, open the Work management view.
2. Open the record for either the work order or work order task that you want to create a part requirement for.
   - To open a work order record, select the **Work orders** tab. From the list of available work orders, select the work order that you want to create a part requirement for.
   - To open a work order task record, select the **Work order tasks** tab. From the list of available work order tasks, select the work order task that you want to create a part requirement for.
3. On the **Part Requirements** tab of the work order or work order task record, select **New**.
4. On the Create New Part Requirement form, fill in the fields.

Create New Part Requirement form

Field	Description
Model	Enterprise model of the missing asset or part.
Service order task	Work order task that the part requirement is associated with.
Required quantity	Quantity of the asset or part that is required. **Note:** This field is applicable to consumable assets and parts only.
Required by date	Date and time by which the missing asset or part must be sourced and delivered.
Short description	Brief description of the part requirement.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Mandatory	Option that indicates if the missing asset or part is required.

5. Select **Save**.

Select descendant models of multi-component assets to create part requirements

qFor work orders and work order tasks that have multi-component assets, select descendant models to create part requirement records.

Before you begin

Role required: sn_eam.enterprise_asset_manager or wm_agent

Note: You can use the wm_agent role to create part requirements only for assigned work order tasks.

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Work management**.
2. Open the record for either the work order or work order task that you want to create a part requirement for.
   - To open a work order record, select the **Work orders** tab. From the list of available work orders, select the work order that you want to create a part requirement for.
   - To open a work order task record, select the **Work order tasks** tab. From the list of available work order tasks, select the work order task that you want to create a part requirement for.
3. On the **Part Requirements** tab of the work order or work order task record, select **Add to Asset**.
   The Add parts requirement dialog box opens.
4. Select a work order task in the **Service order task** field.
   The **Service order task** field is visible only if you access the Add parts requirement dialog box from the work order form.
5. Select the models.
6. Select **OK**.
   The new part requirement records are created and appear in the Part Requirements page.

Create dependencies for an Enterprise Asset Management work order task

If your work order task requires any upstream or downstream task dependencies, add them to your work order task.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Work management view.
2. On the **Work order tasks** tab, select the work order task that you want to create dependencies for.
   The work order task opens.
3. Select one of the following tabs to create either an upstream or downstream task dependency:
   - To create an upstream task dependency, select the **Depends on** tab.
   - To create a downstream task dependency, select the **Dependents** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Select **New**.
5. In the **Upstream task** or **Downstream task** field of the Create New Service Order Task Dependency form, search for and select the task that you want to add as a dependency.
6. Select **Save**.

Manage assets in a work order task

Add, remove, or move enterprise assets across work order tasks to manage the work performed on specific assets.

Before you begin

The work order task must be in one of the following states:

- Draft
- Pending assignment
- Accepted

Before you move assets to another work order task, consider the following points:

- You can't move all assets out of a work order task.
- The **Move to cloned task** option isn't available if the work order task has only one asset.

Role required: sn_eam.asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Work order tasks**.
3. Select the work order task for which you want to manage assets.
4. Select the **Affected assets** tab.
5. Perform the required asset action.

Asset action	Steps
Add assets to the work order task	**a.** Select **Add asset(s)**. **b.** Select the assets that you want to add to the work order task. **Note:** The list of available assets when adding depends on the work or der association: ▪ If the work order is for an asset group, assets that are in the asset group but not yet in the Affected as sets list are shown. ▪ If the work order is for an asset or lo cation, all assets in that location are shown. **c.** Select **Add**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset action	Steps
Remove assets from the work order task	**a.** Select the assets that you want to remove. **b.** Select **Remove**. **c.** In the Delete dialog box, select **Delete all** to confirm.
Move assets to another work order task	**a.** Select the assets that you want to move to another work order task. **b.** Select **Move to cloned task**. **c.** In the Confirm task cloning and asset reas signment dialog box, select **Confirm**.

Note: You can also add and remove assets from the work order by using the **Add asset(s)** and **Remove** options.

Result

- Add assets: The asset appears in the **Affected assets** tab.
- Remove: The asset is removed from the Affected assets list. If the work order is associated with an asset group, the asset is removed from the Affected assets list only, not from the asset group.
- Move to cloned task: A new work order task is created for the same work order, and the asset is moved to that task. The asset no longer appears in the Affected assets list of the original work order task.

Shut down enterprise assets for maintenance activities

Move enterprise assets of a shutdown work order task to the shutdown state to indicate that the assets are unavailable for use during maintenance.

Before you begin

The shutdown work order task must be in the Work in progress state before you can shut down assets. The assets must be in the In use or In maintenance state.

Role required: sn_eam.asset_technician

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Work order tasks** tab.
3. Select the work order task of the Shutdown work type that has the assets that you want to shut down.
4. Select **Start Work**.
5. Select the **Affected assets** tab.
6. Select the assets that you want to shut down, and then select **Shutdown**.
7. In the Confirm asset state change dialog box, select **Confirm**.

Result

The substate of the assets that are shut down changes to Is shutdown.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Start up enterprise assets after maintenance activities

Move assets of a startup work order task to the In use state to indicate that the assets are available for use after maintenance.

Before you begin

The startup work order task must be in the Work in progress state before you can start up assets.

Role required: sn_eam.asset_technician

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Work order tasks** tab.
3. Select the work order task of the Startup work type that has the assets that you want to start up.
4. Select **Start Work**.
5. Select the **Affected assets** tab.
   The State and Substate of the assets are In use and Is shutdown.
6. Select the assets that you want to start up, and then select **Start up**.
7. In the Confirm asset state change dialog box, select **Confirm**.

Result

The Substate of the asset is empty and the asset is back in use.

Move enterprise assets to maintenance state

Move assets of a break fix or planned maintenance work order task to the In maintenance state to indicate that the assets are under maintenance.

Before you begin

The break fix or planned maintenance work order task must be in the Work in progress state before you can move assets to the In maintenance state.

Only assets in the following states and substates can be moved to the In maintenance state:

- In use
- In use and Pending repair
- In use and In repair
- In use and Is shutdown

Role required: sn_eam.asset_technician

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Work order tasks** tab.
3. Select the work order task of the Break Fix or Planned Maintenance work type that has the assets that you want to move to maintenance.
4. Select **Start Work**.
5. Select the **Affected assets** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Select the assets that you want to mark as in maintenance, and then select **Move to maintenance**.
7. In the Confirm asset state change dialog box, select **Confirm**.

Result
The State of the assets changes to In maintenance.

Managing work for your enterprise assets

You can track and manage work for your enterprise assets and linear assets by using work orders and work order tasks. Supported asset actions for your work orders include asset deployment, swapping, removal, and calibration.

Source parts for an Enterprise Asset Management work order or work order task

If the enterprise asset that is associated with your work order or work order task is missing any required assets or parts, source them using a catalog request.

Before you begin
Role required: sn_eam.enterprise_asset_manager or wm_agent

> **Important:** Although you can use either the sn_eam.enterprise_asset_manager or wm_agent role to create catalog requests, you can use only the sn_eam.enterprise_asset_manager role to source those requests.

About this task
You can verify which assets or parts are missing using the **Part Requirements** tab on the work order or work order task. For more information on part requirements, see Create a part requirement for an Enterprise Asset Management work order or work order task.

You can specify parts requirements that you want to source instead of sourcing all parts requirements.

Procedure
1. From the Enterprise Asset Workspace, open the Work management view.
2. Open the record for either the work order or work order task that you want to source parts for.
   - To open a work order record, select the **Work orders** tab. From the list of available work orders, select the work order that you want to source parts for.
   - To open a work order task record, select the **Work order tasks** tab. From the list of available work order tasks, select the work order task that you want to source parts for.
3. On the work order or work order task record, select **Source Parts Request**.
   The Source parts request dialog box opens. All part requirement models that have still not been requested are listed and selected by default.
4. Enter the quantity that you want to request in the **Request quantity** field.
   The quantity you enter can be greater than the required quantity.
5. Select **OK**.
   A confirmation message appears, indicating that a corresponding catalog request has been created only for the selected parts requirement.
6. From the left navigation menu of the Enterprise Asset Workspace, open the Asset operations view.
7. On the **Lists** tab of the Asset operations view, navigate to **Procurement** > **Requests**.
8. Select the request for the assets or parts that you need to source.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The catalog request record opens. You can verify the assets or parts that you need to source by using the **Requested Items** tab of the catalog request record.

9. On the **Catalog Tasks** tab of the catalog request record, select the task number for the Source Request Items catalog task.
   The Source Request Items catalog task opens.
10. Select **Source request**.
    You are automatically redirected to the corresponding source request.
11. Source the required assets or parts using one or more of the following options:

    Note: The source request displays all assets and parts that need to be sourced. However, you must source each asset and part separately.

    - **Local stock**: Option to consume assets or parts from a local stockroom.

      To use this option, click **Consume** on the Local stock widget. When prompted, specify the consumption details for the source request.

    - **Transferable stock**: Option to transfer assets or parts between available stockrooms or to a location where the requester can receive those assets or parts.

      To use this option, click **Transfer** on the Transferable stock widget. When prompted, specify the transfer details for the source request.

    - **Vendor purchase**: Option to purchase additional assets or parts from a supported asset vendor.

      To use this option, click **Purchase** on the Vendor purchase widget. When prompted, specify the purchase details for the source request.

12. Select **Submit**.
    The Source Request dialog box opens.
13. In the dialog box, select **OK**.
    The dialog box closes and you automatically return to the catalog request record.

Complete and close the Confirm asset task for a serialized enterprise asset

If your work order is associated with a serialized enterprise asset, complete and close the Confirm asset task for that asset.

Before you begin

Role required: sn_eam.enterprise_asset_manager

About this task

Before an agent can perform work on an enterprise asset, it must be picked up from its designated stockroom. If you want an agent to perform work on a serialized enterprise asset, you must first confirm which asset needs to be picked up by using the Confirm asset task. For all other enterprise asset types, skip the Confirm asset task and proceed directly to the Pickup task.

Procedure

1. From the Enterprise Asset Workspace, open the Enterprise asset estate view.
2. On the **Asset tasks** tab, select the **Confirm** task for the serialized enterprise asset that is associated with your work order.
   The Confirm task opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. On the **Details** tab of the Confirm task, modify the fields as needed.

Details tab

Field	Description
Asset	Serialized enterprise asset that is associated with your work order.
Model	Model of the serialized enterprise asset.
State	State of the Confirm task.
Stockroom	Stockroom that the serialized enterprise asset is located in.
Short description	Brief description of the Confirm task.
Description	Detailed description of the Confirm task.

4. Select **Close Task**.

Result
The state of the Confirm task changes from Open to Closed Complete. The Enterprise Asset Management application then generates a subsequent Pick Up task for the enterprise asset.

What to do next
The agent who is assigned to the associated work order must complete and close the Pick Up task.

Complete and close the Pick Up task for an enterprise asset

Complete and close the Pick Up task for the enterprise asset that is associated with your assigned work order.

Before you begin
Role required: wm_agent

About this task
Before you can begin working on an enterprise asset, it must be picked up from its designated stockroom.

Procedure
1. From the Enterprise Asset Workspace, open the Work management view.
2. On the **My asset pickup tasks** tab, select the enterprise asset that was picked up.
   The Pick Up task opens.
3. On the **Details** tab of the Pick Up task, modify the fields as needed.

Details tab

Field	Description
Asset	Enterprise asset that was picked up.
Assigned to	Person that the Pick Up task is assigned to.
State	State of the Pick Up task.
Quantity	Quantity of the enterprise asset that was picked up.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Note: This field is applicable to consumable enterprise assets only.	
Short description	Brief description of the Pick Up task.
Description	Detailed description of the Pick Up task.

4. Select **Close Task**.

Result
The state of the Pick Up task changes from Open to Closed Complete.

What to do next
Complete all required work for the enterprise asset so that you can close the work order.

Complete and close a work order for an enterprise asset

Close an assigned work order by completing all work that is required for the associated enterprise asset.

Before you begin
Role required: wm_agent

About this task
When working on an enterprise asset, you can choose to deploy, swap, or remove any required assets or parts. Similarly, you can deploy a discrete asset to a linear asset, swap a discrete asset associated with a linear asset, or remove a discrete asset associated with a linear asset. You can also choose to calibrate the enterprise asset. After you complete all work for the asset, you can close the associated work order.

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. On the **Work order tasks** tab, select the work order task for the work order that you want to complete and close.
3. Select **Start Work**.
   The work order task reloads with an updated State of Work In Progress.
4. Complete all work that is required for the work order task.
   - If you want to deploy, swap, or remove any required assets or parts, follow these steps:
     a. Select the **Asset Usages** tab.
     b. Select the action that you're taking on an asset or part that is required for the associated enterprise asset.

Available actions

Action	Description
Remove Asset	Option to remove an asset or part. You can also remove a discrete asset associated with a linear asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action	Description
	Note: You can remove assets or parts that have a state of In use, In maintenance, and Consumed only. **i.** In the **Remove asset** field, select the asset or part that you want to remove. **Note:** The assets available in this field depend on whether the **Affected assets** list is populated. ▪ If the Affected assets list is populated, only assets in the list and their descendants with the **Required** field set to **false** are available. ▪ If the Affected assets list is empty — for example, when the work order and work order task are based on a location — assets associated with the work order task location and descendant locations are available. Descendant assets are included only if the **Required** field is set to **false**. **ii.** Select **OK**. **Result** ▪ The asset or part that is removed appears on the **Asset Usages** tab. The removed asset or part is assigned to your personal stockroom. Execute all subsequent disposal tasks to complete the removal. ▪ The State and Substate of the asset change to In stock and Pending disposal. ▪ The Location field is empty. ▪ If the work order task is based on an asset group, the removed asset is also removed from the asset group.
Swap Asset	Option to swap an asset or part. You can also swap a discrete asset associated with a linear asset with another discrete asset In the Deploy asset dialog box, perform the following steps: **i.** In the **Asset to swap out** field, select the asset or part that you want to swap out. **Note:** The assets available in this field depend on whether the Affected assets list is populated. ▪ If the Assets Affected list is populated, only assets in the list and their descendants with the **Hot swappable** field set to **true** are available. ▪ If the affected assets list is empty — for example, when the work order and work order task are based on a location — assets associated with the work order task location and descendant locations are available. Descendant assets are included only if the **Hot swappable** field is set to **true**. **ii.** In the **Replacement Asset** field, select the replacement asset or part

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action	Description
	Note: The replacement asset or part must meet the following criteria: ▪ The **State** field in the corresponding asset record is set to **In stock**. If the asset or part is associated with a multi-component enterprise model that has hot-swappable model components, this field can also be set to **In use**. ▪ The asset or part is either displayed on the **Asset Usages** tab or located in your personal stockroom. ▪ The asset or part is associated with either the same enterprise model as the existing asset or part or a substitute enterprise model that is supported by the existing asset or part. For more information on substitute enterprise models, see Add a substitute model for an enterprise model. **iii.** Select **OK**. **Result** After the swap is complete: ▪ Both the swapped-out asset or part and the replacement asset or part appear on the **Asset Usages** tab. ▪ The replacement asset is automatically added to the Affected assets list. ▪ If the work order task is based on an asset group, the swapped-out asset is removed from the asset group, and the replacement asset is added to it.
Deploy Asset	Option to deploy an asset or part. You can also deploy a discrete asset to a linear asset. **Note:** You can deploy assets or parts that are displayed on the **Asset Usages** tab and have a status of Not Used. You can deploy assets or parts from your personal stockroom that have a state of In stock and a substate of either Available or Reserved. **i.** In the **Asset to deploy** field, select the asset or part that you want to deploy. **Note:** If you select a consumable asset or part, you must also specify the quantity that you want to deploy in the **Quantity** field. **ii.** (Optional) In the **Assign to user** field, select the user to whom you want to assign the asset or part. **iii.** (Optional) In the **Add to asset** field, select the parent asset or part to which you want to add the asset or part. **iv.** Select **OK**. **Result**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action	Description
	▪ The deployed asset with a status of Used appears in the **Asset Usages** tab. ▪ If the work order task has an asset group and affected assets list, the deployed asset is added to the asset group and to the **Affected assets** list. ▪ If the work order task has an affected assets list but no asset group selected, the deployed asset is added to the **Affected assets** list only. To deploy a discrete asset to a linear asset, in the **Deploy asset** dialog box, select a discrete asset from your stockroom, and then choose one of the following options: ▪ **Add to discrete asset**: Select the discrete asset to which you want to add the selected asset as a child asset. ▪ **Add to existing location**: Select an existing location ▪ **Add to new location**: Use the location picker to mark the new location on the geo map.

c. Repeat step b for every asset or part that you want to deploy, swap, or remove.

- To calibrate the associated enterprise assets, perform the following steps:

a. Select the **Calibrations** tab.

The **Calibrations** tab displays a calibration event for each asset in the **Affected assets** tab that has a calibration attribute defined. The number of calibration events depends on the work order association:

- If the work order is associated with an asset, one calibration event is created, provided the asset has a calibration attribute defined and no other assets are added to the Affected assets list.
- If the work order is associated with an asset group, one calibration event is created for each asset from the asset group that is added to the Affected assets list and has a calibration attribute defined.

b. Select the calibration event for the asset that you want to calibrate.

The Service event details page opens.

c. Select the **Calibration** tab.

The Calibration event playbook is displayed.

Note: Each lane in the side panel of the playbook represents an activity that you must complete as part of the calibration event workflow.

d. In the work area of the Details lane, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details lane

Field	Description
Name	Name of the calibration event.
Temperature	Temperature of the environment in which you're performing the calibration.
Temperature unit	Unit of temperature that you're using to measure the environmental temperature.
Humidity (%)	Relative humidity level of the environment in which you're performing the calibration.

e. Select **Mark as complete**.

The Details lane is marked as Complete and you automatically progress to the Calibration Lines lane.

f. In the work area of the Calibration lines lane, select the calibration line that you want to complete or skip.

Each calibration line corresponds with a calibration attribute on the associated enterprise asset. If any calibration attribute contains multiple points at which you can measure accuracy, the Enterprise Asset Management application creates a separate calibration line for each point. You can choose to complete or skip each calibration line as needed. For more details on calibration attributes, see Add calibration attributes to an enterprise asset or Add calibration attributes to an enterprise model.

g. On the calibration line record, use one of the following options to complete or skip the calibration line:

- To complete the calibration line, fill in the fields and then select **Submit**.

Calibration line fields

Field	Description
Details	
Instrument	Instrument that you're using to perform the calibration. If you specified an instrument model in the **Instrument model** field of the corresponding calibration attribute, the options in this field are filtered based on the specified instrument model.
Calibration date	Date and time at which you're performing the calibration. This field populates automatically based on the date and time at which the Details lane was marked as complete. You can overwrite this field if needed.
Readings	
Expected value	Value that you are measuring tolerance conformance against. This field populates automatically based on the expected value that you specified in the calibration attribute.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This field appears only if you set the Value type of the calibration attribute to either Accuracy % full scale, Accuracy % point, or True/false.
As found value	Value that you measure prior to the calibration.
As left value	Value that you measure after the calibration.
Comment	Additional comments about the calibration.

- To skip the calibration line, select **Skip**.

The calibration line record closes and you automatically return to the playbook.

h. Repeat steps d and e for each calibration line in the Calibration lines lane.

Note: If any of your calibration lines have a Result of Failed, you can remediate the entire calibration event by initiating a new work order and corresponding work order tasks. See Remediate an unsuccessful enterprise asset calibration for detailed instructions.

i. Select **Mark as complete**.

The lane is marked as Complete.

j. Repeat steps b through i for each calibration event in the **Calibrations** tab.

5. After you complete all required work, select **Close Complete** on the work order task.
The state of both the work order task and associated work order changes from Work In Progress to Closed Complete.

Bulk closure of work order tasks

Close multiple work order tasks in one go.

Before you begin

Role required: enterprise_asset_technician

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Work Management**.
2. Select the Work order tasks tab.
All work order tasks, assigned to the assignment group of the logged in technician, are listed.
3. Select **Bulk close tasks**.
All work order tasks, that can be closed by the logged in technician, are listed.
4. Select the check boxes for the work order tasks that you want to close.
5. Select **Add details and close**.
The Bulk close tasks dialog box opens.
6. Fill in the details in the Bulk close tasks dialog.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Work notes	Details about the work tasks.
Time worked	The cumulative time (days, hours, and min utes) taken to complete all the tasks.
Comments	Additional comments regarding the work tasks.

7. Select **Save**.
   The selected work orders tasks are closed.

Remediate an unsuccessful enterprise asset calibration

Remediate a failed enterprise asset calibration event by initiating a new work order and corresponding work order tasks for that event.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace**.
2. From the Enterprise Asset Workspace, open the Work management view.
3. Select the **Calibrations and conditions** tab.
4. In the Calibration overview section, select either the **All calibration events** widget or the **Calibration pending verification** widget.
5. From the list of available calibration events, select the event that you want to remediate.
   The corresponding service event record opens.
6. Initiate the creation of a new work order by selecting **Remediate**.
7. In the Select template to begin remediation dialog box, search for and select the template that you want to apply to the new work order.

   Note: The dialog box lists only the work order templates that have at least one work order task with a Work type of Calibration.

8. Select **OK**.
   The dialog box closes and you are automatically redirected to the Create New Work Order form. The form is auto-populated with the following information:
   - The asset that you want to calibrate
   - The location of the asset
   - The original work order
   - All other mandatory fields
9. **Optional:** Fill out any additional fields in the Create New Work Order form and then select **Save**.
   See Create a work order for an enterprise asset for a detailed description of each field.
10. **Optional:** Add additional work order tasks to the new work order.
    See Create a work order task for an Enterprise Asset Management work order for detailed instructions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

11. **Optional:** Create a checklist of all items that must be completed for the new work order or the associated work order tasks.
    See Create a checklist for an Enterprise Asset Management work order or work order task for detailed instructions.
12. **Optional:** Specify any upstream or downstream dependencies for the associated work order tasks.
    See Create dependencies for an Enterprise Asset Management work order task for detailed instructions.
13. Select **Ready for Work** to initiate work for the new work order.

What to do next

Work with the assigned agent to complete and close all subsequent tasks for the new work order.
See Managing work for your enterprise assets for detailed instructions.

Schedule condition evaluations for enterprise models or assets

Schedule a condition evaluation by creating a work order for it.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Work management**.
2. On the **Work orders** tab, select **New**.
3. Select **Asset condition work order** in the **Template** field.
   For more details on creating a work order, see Create a work order for an enterprise asset.
4. After you have entered the details in the work order, select **Save**.
   The work order is created in the draft state.
5. Select **Ready to Work**.

   A work order task gets created for the work order in the **Work Order Tasks** tab.

   Additionally, a service event gets created along with condition lines. Depending on the number of templates linked to the asset, an equivalent number of assessment lines are generated. Only a single service event gets created per asset.
6. Open the work order task and assign it to an enterprise technician.
   A service event gets created along with condition lines. Depending on the number of attributes created on the asset, an equivalent number of condition lines are generated. Only a single service event gets created per work order task. The technician must log in to begin work on the work order task.

Perform condition evaluation from the Enterprise Asset Workspace

Perform condition evaluation to calculate the score and result of the condition attributes from the Enterprise Asset Workspace.

Before you begin

Role required: sn_eam.asset_technician

About this task

These steps detail the process of performing the condition evaluation from the Enterprise Asset Workspace. Condition evaluation can also be performed from the Mobile application. For details, see Perform condition evaluation from the Mobile Agent application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management** > **Work order tasks**.
2. Select the condition work task assigned to you.
3. Select **Accept** and then select **Start work**.
   The status of the work order task changes to **Work in Progress**
4. Select the **Condition lines** tab.
   The Condition lines related list displays condition lines for all assets in the Affected assets list. A condition evaluation is created for each asset, and you must complete all condition lines to complete and close the task.
5. Select the condition evaluation for the condition line that you want to assess.
6. Enter a value for the questions in the sections.
7. Select **Submit**.
8. In the confirmation box, select **Submit**.

   After you submit the condition evaluation, refresh the **Condition lines** page to view the score and result for the condition line.
9. Repeat steps 5 through 8 for each condition line in the **Condition lines** tab.
10. Select **Close Complete** in the Condition work task page.
    The Enterprise asset manager can review the asset condition results and view the reports in the Work management dashboard. For more details, see Review the asset condition results.

Review the asset condition results

After the enterprise technician has completed the condition evaluation, the enterprise asset manager reviews the condition evaluation and views the reports in the Work management dashboard.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **All** > **Enterprise Asset Workspace** > **Work management** > **work order tasks**.
2. In the Condition lines tab, select a service event.
   The Service event details page opens.
3. Select **Accept** or **Remediate**.
   If you accept the condition event, the status of the event changes to **Accepted**. If you choose to remediate the event, the status of the service event changes to **Pending remediation**.
4. View the asset condition reports by navigating to the **Work management** > **Calibrations and conditions**.
5. On the dashboard, scroll down to view the asset condition overview.

Create a template for your Enterprise Asset Management work orders

Create a work order template to automatically populate information, generate appropriate tasks, and create asset or part requirements for your work orders.

Before you begin

Role required: sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Work order templates are added to the Field Service Catalog, which is part of the ServiceNow® Field Service Management application. You can access the Field Service Catalog by navigating to **All** > **Field Service** > **Catalog and Knowledge**. See Field Service Management for more information on the Field Service Management application.

Note: The Field Service Management application is automatically activated when you request and install the Enterprise Asset Management application from the ServiceNow Store.

Procedure

1. From the Enterprise Asset Workspace, open the Work management view.
2. On the **Work order templates** tab, select **New**.
   The Work Order Templates form opens in a new browser tab.
3. On the form, fill in the fields.

Work Order Templates form

Field	Description
Name	Name of the work order template.
Short Description	Brief description of the work order template.
Description	Detailed description of the work order template.
Checklist template	Checklist template of all items that you must complete as part of a work order.
Workflow **Note:** This field appears only if you select the Add icon next to the **Name** field.	Workflow for work orders that this template is applied to.

4. Add required tasks to the work order template.
   a. Select **Add Task**.
   b. On the Task information form, fill in the fields.

Task information form

Field	Description
Task type	Type of task that you want to create. This field is automatically set to **Work Order Task**.
Name	Name of the task.
Description	Detailed description of the task.
Parts and quantities	Asset or part that is required for completing the task. If you select a consumable asset or part, you must also specify the quantity that is required for completing the task. You can add multiple assets or parts to a single task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: Select the **Mandatory** check box for every asset or part that is required for completing the task.
Dispatch group	Group of agents to whom the task is assigned.
Depends on	Other tasks that must be completed before this task initiates.
Checklist template	Checklist template of all items that you must complete as part of the task.
Work type	Type of work that an agent must perform to complete the task. The options include **Break Fix**, **Calibration**, **Install**, and **Planned Maintenance**.

c. Repeat steps a and b for each additional task that you want to add to the work order template.

5. Attach related knowledge base articles to the work order template.
   If your work order template is related to any knowledge base articles with useful reference information, attach the articles to the template.
   a. In the Model Knowledges related list, select **New**.
   b. On the Model Knowledge form, select the Lookup using list icon in the **Knowledge** field to search for and select the knowledge base article that you want to attach to the work order template.
   c. Select **Submit** in the Model Knowledge form header.
   d. Repeat steps a to c for each knowledge base article that you want to attach to the work order template.
6. Select **Submit**.
   The Publish Template dialog box opens.
7. In the dialog box, fill in the fields.

Publish Template dialog box

Field	Description
Category	Field Service Catalog category to which you want to assign the work order template.
Availability	Supported Field Service Catalog format for the work order template. The options are **Desktop Only**, **Mobile Only**, and **Desktop and Mobile**.

8. Select **Publish**.

Result
The work order template is added to the Field Service Catalog.

Create a checklist template for your Enterprise Asset Management work orders

Create a checklist template for your work orders that gets added as a work order template.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sn_eam.enterprise_asset_manager

About this task
You can either copy from an existing checklist template and edit and add more checklist items or you can create a template.

Procedure
1. Navigate to **Enterprise Asset Workspace** > **Work Management** > **Checklist templates**.
2. Select **New**.
3. In the **Create checklist template** dialog box, fill in the fields.

Field	Description
Name	Name of the checklist template.
Copy from template	List of existing templates that you can copy from.
Checklist items	The checklist items for the template. ○ If you selected a template from the **Copy from template** list, the checklist items per taining to that template automatically ap pear. Each checklist item has a name and order that you can edit. You can add addi tional checklist items ○ For a new template, specify the name and order of each checklist item in the **Name** and **Order** fields. You can add multiple checklist items.

4. Select **OK**.

Result
The checklist template is created and appears in the Checklist templates list. After a checklist template is created, it can't be edited and can be used by other applications too.

Delivering enterprise assets in your personal stockroom through Drop off tasks

As an enterprise asset technician, manage the delivery of enterprise assets that you have in your personal stockroom to any other warehouse stockroom by creating Drop off tasks. The asset manager of the destination stockroom receives the assets that you dropped off, verifies the asset, and completes the Receive and Drop off tasks.

You can drop off enterprise assets that aren't reserved and not part of any Enterprise Asset Management workflows.

As an enterprise asset technician, you can create drop off tasks in the Enterprise Asset Workspace or through the Mobile Agent application.

You should perform the following tasks to deliver assets to any stockroom:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tasks to deliver assets to any stockroom

Interface	Tasks
Enterprise Asset Workspace	**1.** Create a Drop off task. **2.** Drop off the assets at the destination stockroom.
Mobile Agent application	Create a Drop off task for enterprise assets using the Mobile Agent application.

The Drop off task that you submitted completes only when the asset manager of the destination stockroom completes the following tasks in the Enterprise Asset Workspace or through the Mobile Agent application.

Tasks to receive assets at a stockroom

Interface	Tasks
Enterprise Asset Workspace	**1.** Verify the received assets. **2.** Close the Receive task.
Mobile Agent application	Verify the enterprise assets received through a Drop off task using the Mobile Agent application.

Create a Drop off task for enterprise assets

Create a Drop off task to return the enterprise assets in your personal stockroom to any other warehouse stockroom.

Before you begin

Role required: sn_eam.enterprise_asset_technician

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **My stockroom assets** tab.
   The list of enterprise assets in your personal stockroom is displayed.
3. Select **Schedule drop off**.
4. On the form, fill in the fields.

Create New Drop Off task form

Field	Description
Stockroom	Stockroom at which you want to drop off the assets. This field is required.
Delivery by date	Date by when you want to deliver the assets to the destination stockroom. This field is required.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Assignment group	Assignment group to which you want to assign the drop off task.
Assigned to	Person from the assignment group who is primarily responsible for the drop off task.

5. Select **Save**.

Result
A Drop off task in the Open state is created and listed in the **Asset tasks** tab.

What to do next
Drop off enterprise assets at a stockroom.

Drop off enterprise assets at a stockroom

Add enterprise assets to a Drop off task and deliver the assets to the required stockroom.

Before you begin
Role required: sn_eam.enterprise_asset_technician

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Asset tasks** tab.
3. From the list of asset tasks, select the drop off task for which you want to add enterprise assets.
4. Select the **Drop off Assets** tab.
5. Select **Add**.
6. In the **Add assets** dialog box, select the assets and select **Add**.
   You can only add enterprise assets that are in your personal stockroom and that aren't reserved and aren't part of any workflows.

   The assets added to the drop off task are listed in the Drop off Assets tab.
7. Drop off the assets at the required stockroom.
8. Select **Drop off**.

Result
- A Receive task is created and assigned to the asset manager of the stockroom where you dropped off the assets.
- The state of the Drop off task changes to Work in Progress.

Verify the enterprise assets received through a Drop off task

As an asset manager, confirm that you received the enterprise assets that were delivered to your stockroom and complete the Receive task.

Before you begin
Role required: sn_eam.enterprise_asset_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Asset tasks** tab.
3. From the list of asset tasks, select the Receive task for which you want to verify the assets received.
4. Select the **Drop off Assets** tab.
   The list of assets that were dropped off at your stockroom is displayed.

   Note: The **Asset received** flag is set to **false** before an asset is verified.

5. Select an asset.
6. Select **Verify**.
   - The **Asset received** flag changes to **true**.
   - The **Receive date** is updated with the date on which you verified the asset.
7. After you verify all the assets, select **Close task**.

Result
The state of the Receive task and its Drop off task changes to Closed Complete.

Record time worked on Drop off and Receive tasks for enterprise assets

Manage and record time worked on Drop off and Receive asset tasks in the Enterprise Asset Workspace. After you start work on a task, you can pause and resume work. You can also record the time worked manually.

Record time worked on a Drop off task or Receive task manually

Create an entry for the time worked on a Drop off or a Receive task manually in the Enterprise Asset Workspace.

Before you begin
Role required:

- To record time worked on a Drop off task: sn_eam.enterprise_asset_technician
- To record time worked on a Receive task: sn_eam.enterprise_asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Asset tasks** tab.
3. From the list of asset tasks, select the task for which you want to record time manually.
4. Indicate that you started work on the task by selecting **Start Work**.
   The **Start Work** option changes to **Start Timer** and **Record Time** automatically.
5. Select **Record Time**.
6. In the **Record Time** dialog box, enter the details of the time worked.
   a. Enter the time duration that you worked on the task in the **Days**, **Hours**, and **Minutes** fields.
   b. **Optional:** Provide any additional information in the **Comments** field.
7. Select **Save**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The Time Worked form is saved and the time card is added to the Time Worked tab of the task.

Pause a Drop off task or Receive task for enterprise assets

Record a break from a Drop off or Receive task in the Enterprise Asset Workspace if you're not continuing to work on it.

Before you begin
You can pause a Drop off or Receive task that is in the Work in Progress state. The option to pause the task is available only after you perform the following actions:

1. Indicate that you have started working on the task by selecting **Start Work**.
2. Start recording the time by selecting **Start Timer**.

Role required:

- To record time worked on a Drop off task: sn_eam.enterprise_asset_technician
- To record time worked on a Receive task: sn_eam.enterprise_asset_manager

About this task
You can resume the task when you start working on it again. The system automatically tracks and calculates the actual time taken to complete the task even though the work was interrupted.

Procedure
1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Asset tasks** tab.
3. From the list of asset tasks, select the task that you want to pause.
4. Select **Pause Work**.
   The **Pause Work** changes to **Resume Work**.
5. Select **Resume Work** when you're ready to work on the activity again.

Result
Each time you pause or resume work on the task, the actual time you worked on the task is automatically calculated. An entry for the time worked is created in the Time Worked tab.

Perform condition evaluation from the Mobile Agent application

Perform condition evaluation to calculate the score and result of the condition attributes from the Mobile Agent application.

Before you begin
An asset condition work order task for an asset must be created and assigned to the technician.

Role required: sn_eam.asset_technician

About this task
A work order task can be associated with multiple assets, either through an asset group or by assets added to the Affected assets list. When a work order task has multiple assets, the technician must assess the condition of each asset within the same work order task. After completing all condition evaluations, the condition results are recorded for each asset and are available for the enterprise asset manager to review.

These steps detail the process of performing the condition evaluation from the Mobile Agent application. Condition evaluations can also be performed from the Enterprise Asset Workspace. For details, see Perform condition evaluation from the Enterprise Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen opens with the list of tasks assigned to you.
3. Tap the work order task for which you want to take action.
4. On the **Details** tab, tap **Start Work**.
5. Tap the **View asset conditions** tab.
   The **Assessment lines** screen opens and shows condition lines for all assets in the Affected assets list. A condition evaluation is created for each asset, and you must complete all condition lines to complete and close the task.
   - The **Open** tab displays all condition lines associated with the assets that are not yet completed.
   - The **Completed** tab displays all completed asset condition lines.

   Initially all the condition lines are in an open state and each condition line is associated with a template. The asset associated with the condition line is shown.
6. Tap a condition line record.
   The mobile UI of the condition evaluation that is associated with the corresponding condition line opens.
7. Tap **Next** and answer the questions.
8. Tap **Submit** once you have answered all the questions.

   The score gets calculated and populated on the condition line record that moves to the completed state, and a pass or fail determination is made based on the scores. If the pass and fail criteria wasn't defined on a condition line, then the score displays as NA.
9. Repeat steps 6 through 8 for each condition line for all assets in the work order task.

   After all condition lines are completed, the **Close** button appears on the work order task.
10. Tap **Close** to close the work order task.

Manage asset-centric work tasks using work order plans

Work order plans organize sequential asset tasks — such as shutdowns, safety inspections, calibrations, asset condition assessments, and restarts — under a single unified plan, enabling repeatable and scalable execution.

Key benefits

- Increased operational efficiency: Organize complex asset-centric tasks under a single plan with support for technician assignment and scheduling.
- Guided experience: Create, assign, track, and complete work order plans through a structured Playbook interface.
- Asset-centric workflows: Sequence maintenance operations across multiple assets or asset groups for consistent and repeatable execution.

Roles

The following roles are involved in the work order plan workflow:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Asset manager (sn_eam.asset_manager): Creates and manages work order plans, defines the scope of work, assigns work order tasks to technicians, and schedules and tracks tasks.
- Asset technician (sn_eam.asset_technician): Receives assigned tasks with all instructions and completes tasks using the Mobile Agent application with real-time status updates.

Work order plan workflow

The work order plan workflow involves the following stages:

1. Details: Create a work order plan by providing the details of the assets or asset groups in scope, and the work order tasks to be performed. Tasks can include safety preparation, shutdown, maintenance, calibration, asset condition assessment, and restart.
2. Review affected assets: Confirm the assets to include in the work order plan.
3. Review assignments: Assign work order tasks to assignment groups or technicians.
4. Review schedule: Set the scheduled start and end times for each work order task.
5. Track status: Track task status updated by the assigned technicians and review the available work order plan reports.

Create a work order plan template

Create a reusable work order plan template to use when creating work order plans.

Before you begin

Role required: sn_eam.asset_manager

Procedure

1. Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**.
2. Select the **Work order plan templates** tab.
3. Select **New**.
4. On the form, fill in the fields.

Create New work order plan template form

Field	Description
Name	Name of the work order plan template.
Description	Description of the work order plan.
Primary target	Asset or asset group for which the work order plan template is created. When you select an asset group, all assets in the asset group are automatically added to the Affected assets list. **Note:** This field is required.
Location	Location of the primary target. This field is automatically populated when you select a primary target. **Note:** If you select a location first, the **Primary target** and **Additional assets** fields are filtered to show only assets in that location.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Additional assets	Assets to include in the work order plan template along with the primary target. Additional assets must be in the same location as the primary target.
Work order template	Work order template that defines the collection of tasks to be performed on the primary target and any additional assets.

5. Select **Save**.

Result
The work order plan template is created and appears in the **Work order plan templates** tab.

What to do next
Use this work order plan template when you create a work order plan.

Create a work order plan for enterprise assets

Create and manage a work order plan to organize, assign, schedule, and track complex asset tasks for enterprise assets and asset groups.

Before you begin
In the **Field Service Configuration** module, the **Apply Work Order template in draft status** setting must be enabled.

Role required: sn_eam.asset_manager

About this task
A work order plan can be created for individual enterprise assets and asset group.

Procedure
1. Create a work order plan.

Create from	Steps
Work management view	**a.** Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Work management**. **b.** Select the **Work order plans** tab. A list of existing work order plans is displayed. **c.** Select **New**.
Asset group	**a.** Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Enterprise asset estate**. **b.** Select the **Asset groups** tab. A list of existing asset groups is displayed. **c.** Select an asset group for which you want to create a work order plan. **d.** Select **Create plan**.

2. In the **Create work order plan** dialog box, complete the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. **Optional:** In the **Work order plan template** field, select the work order plan template that you want to apply to the work order plan.

> **Note:** If you're creating a work order plan from an asset group, only the work order plan templates associated with that asset group are shown.

b. In the **Plan name** field, enter a name for the work order plan.

> **Note:** If you selected a work order plan template, the **Plan name** field is automatically populated with the template name. You can update the name if needed.

c. Select **OK**.

The Work order plan playbook displays the following activities that you must complete in the sequence:

a. **Details**

b. **Review affected assets**

c. **Review work order tasks** including **Review assignments** and **Review schedule**

d. **Track status**

All the activities are in Pending status before you start working on them.

3. In the **Details activity**, complete the work order plan details.

> **Note:** If you selected a work order plan template, the following fields on the Details form are automatically populated from the template:
>
> - **Description**
> - **Location**
> - **Primary target**
> - **Work order template**
> - **Additional assets**

a. On the Details form, review and update the fields as needed.

Details form

Field	Description
Name	Name of the work order plan.
Description	Description of the work order plan.
Location	Location of the primary target. **Note:** If you select a location first, the **Primary target** and **Additional assets** fields are filtered to show only assets in that location.
Primary target	Asset or asset group for which the work order plan is created.
Work order template	Work order template that defines the collection of tasks to be performed on the assets included in the work order plan.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Additional assets	Additional assets to include in the work order plan along with the primary target.
Due date	Date and time by which the work order plan must be completed.

Note: Name, Location, Primary target, and Work order template fields are required.

b. Optional: Select **Save as template** to save the work order plan configuration as a template for future use.

c. Optional: Select **Update** to save your changes and continue editing.

d. Select **Mark complete** to save your changes and move to the next activity in the playbook.

4. In the **Review affected assets** activity, confirm the assets to include in the work order plan.

- To remove an asset, select the asset and then select **Remove**.
- To confirm the assets and proceed to the next activity, select **Mark complete**.

5. In the **Review work order tasks**, assign the work order tasks to technicians and schedule the tasks.

a. In the **Review assignments** activity, assign an assignment group to each work order task.

i. In the **Assignment group** field, select the assignment group.

Note: To assign multiple work order tasks to the same assignment group, select the tasks and then select the assignment group.

ii. (Optional) In the **Assigned to** field, select the technician to whom you want to assign the work order task.

Note: All work order tasks must have an assignment group specified before you can complete this activity. The **Assigned to** field is optional; however, the schedule is populated for work order tasks in the Review schedule activity only when a technician is specified in the Assigned to field.

iii. Select **Mark complete** to proceed to the next activity.

b. In the **Review schedule** activity, schedule the work order tasks.

i.
- To schedule a task manually, inline edit the **Scheduled start** field directly. The **Estimated end** field is automatically populated based on the Estimated work duration.
- To schedule a task using the calendar view, the task must have a technician assigned in the Review assignments activity.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Select **Calendar view** to schedule tasks visually by dragging the edges of a work order task to adjust the scheduled start and estimated end times.
- Reposition the task on the calendar view as needed.
- Double-click a work order task to open the corresponding record for detailed review.

Note: Tasks appear in the calendar view only when assigned to a technician. If only an assignment group is specified, the task isn't displayed. The calendar view also displays active tasks from other work orders, maintenance plans, incidents, and ad hoc work orders.

ii. Select **Ready for work** so that technicians can begin working on the work order tasks.

Note: After you select **Ready for work**, the scheduled start and end times can't be modified.

iii. Select **Mark complete** to proceed to the **Track status** activity.

6. In the **Track status** activity, monitor the progress of the work order tasks.

The following fields are updated automatically based on the technician's actions:

- **State**: Current state of the work order task.
- **Actual work start**: Date and time at which the technician started the task.
- **Actual work end**: Date and time at which the technician closed and completed the task.

Note: Select **Calendar view** to get a visual overview of the scheduled work order tasks. The calendar view displays only tasks that are in the Work in progress state. Completed tasks aren't displayed.

You can track the status of the work order tasks at any time through the associated work order plan.

Using Service Catalog for Enterprise Asset Management requests and flows

Use the Service Catalog application to create catalog requests for the Enterprise Asset Management application.

Overview of using Service Catalog

Use the Service Catalog for creating catalog requests for Enterprise Asset Management flows.

Task	Role required	Resource
Deploy, source, and request catalog items for the Enterprise request flow		Manually fulfill enterprise asset requests by using the enterprise asset request flow
Track and replace assets by using the Enterprise Asset refresh flow		Request an enterprise asset refresh
Resell your assets using the Asset resale flow.		Create an asset resale flow

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Task	Role required	Resource
Onboard multiple assets at one go		Create a catalog request for onboarding multiple assets
Reclaim enterprise assets		Create a catalog request to reclaim enterprise assets

Fulfilling enterprise asset requests

You can fulfill enterprise asset requests that have been submitted through the Service Catalog application. You can fulfill these requests either manually or through the help manage enterprise asset requests agentic workflow.

Fulfill enterprise asset requests by using an agentic workflow

You can use the help manage enterprise asset requests agentic workflow to fulfill enterprise asset requests autonomously. The workflow uses a collection of AI agents to automatically source assets for these requests.

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

Note: Before you use the help manage enterprise asset requests agentic workflow, you can configure and activate it based on your organization's needs. For detailed instructions, see Configure and activate agentic workflows for Enterprise Asset Management.

Help manage enterprise asset requests agentic workflow overview

The help manage enterprise asset requests agentic workflow automates the enterprise asset sourcing process so that you can fulfill enterprise asset requests with little to no human intervention. This automation can help provide the following benefits:

- Increases request resolution.
- Improves operational efficiency.
- Enhances and simplifies the user experience.

Based on the available inventory across your stockrooms, the workflow uses AI agents to automatically source assets through one of the following options:

Automatic sourcing options for enterprise asset requests

Sourcing option	Description
Local inventory	The AI agent automatically uses assets that are available in a local stockroom. This sourcing option is available only when at least one stockroom within the location of the requester has the **Auto-consume** option enabled. If multiple stockrooms have this option enabled, the AI agent uses assets from the stockroom with the highest available quantity first. If any additional assets are required, the AI agent then uses assets from the stockroom with the next highest quantity. **Note:** For instructions on how to enable the **Auto-consume** option, see Create stockroom for enterprise assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Automatic sourcing options for enterprise asset requests (continued)

Sourcing option	Description
Transfer order	The AI agent automatically generates a transfer order to move assets between stockrooms. This sourcing option is available only under the following conditions: • At least one destination stockroom within the location of the requester has the **Auto-transfer** option enabled. • At least one source stockroom has the **Auto-transfer** option enabled. • Destination stockrooms are linked to source stockrooms through distribution channels. The order of stockrooms that you can source and transfer assets from is based on the rank of each stockroom. For more information on distribution channels, see Add a distribution channel to a stockroom in the Enterprise Asset Workspace. **Note:** For instructions on how to enable the **Auto-transfer** option, see Create stockroom for enterprise assets.
Purchase order	The AI agent automatically generates a purchase order to obtain additional assets. This sourcing option is available only under the following conditions: • At least one stockroom within the location of the requester has the **Auto-purchase** option enabled. • At least one vendor is available to purchase the requested asset from. **Note:** For instructions on how to enable the **Auto-purchase** option, see Create stockroom for enterprise assets.

Important: You can enable security implementation to execute AI agents and agentic workflows through Access Control Lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in AI agents.

Important: By default, all agentic workflows and AI agent records are read-only.

Role masking

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Validating enterprise asset requests

Before the help manage enterprise asset requests agentic workflow can begin sourcing assets for an enterprise asset request, it must validate the request. The workflow proceeds only if the request meets the following criteria:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The request has been approved.
- Each requested asset can be sourced.
- Each requested asset has not already been sourced.
- Each asset is either requested directly from the Enterprise Catalog or associated with one of the following models:
  - Any valid enterprise model
  - Any valid hardware model that is supported by the OT Asset Management application
- Each requested asset corresponds with a requested item (RITM) under the enterprise asset request. Each RITM has a valid and unique RITM number.
- Each RITM is assigned to a user with the asset_manager role.

Stages in the help manage enterprise asset requests agentic workflow

The help manage enterprise asset requests agentic workflow fulfills enterprise asset requests through the following stages:

Workflow stages

Stage	Steps
Enterprise asset request initiation	**1.** A user with any role submits an enterprise asset request in the Service Catalog application. **Note:** Each asset that the user requests corresponds with a requested item (RITM) under the enterprise asset request. **2.** Depending on the total cost of the requested assets, the request is approved either automatically or by an asset manager. ○ If the total cost of the requested assets is less than the amount specified in the corresponding automatic approval rule, the request is approved automatically. By default, this amount is set to one thousand dollars. ○ If the total cost of the requested assets is more than the amount specified in the corresponding automatic approval rule, the request must be reviewed and approved by an asset manager. For more information on automatic approval rules, see Set automatic approval rules.
Asset sourcing assignment	**1.** After the request is approved, each RITM must be assigned to a user with the asset_manager role. **2.** After each RITM is assigned to a user, the help manage enterprise asset requests agentic workflow invokes automatically.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow stages (continued)

Stage	Steps
	Note: If the trigger to invoke the workflow is deactivated, the workflow must be invoked manually. For instructions on how to activate or deactivate this trigger, see Activate an agentic workflow template. **Note:** The progress of the workflow is updated and displayed in the ServiceNow Otto panel. Users can access the panel by selecting the ServiceNow Otto icon on the page header of their ServiceNow instance.
Enterprise asset request validation	The workflow validates the request. **Note:** For the complete list of validation criteria, refer to Validating enterprise asset requests. • If the validation is successful, the workflow can proceed with sourcing the requested assets. • If the validation is unsuccessful, the request must be updated and then re-validated.
Asset sourcing and allocation	After the request is successfully validated, the workflow sources the requested assets. **1.** The asset sourcing AI agent checks if the requested assets are available in any local stockrooms. ○ If the requested assets are available, the AI agent checks if the **Auto-consume** option is enabled for any stockrooms that those assets are located in. ▪ If the **Auto-consume** option is enabled, the AI agent uses assets from those stockrooms. ▪ If the **Auto-consume** option is disabled, the workflow proceeds to step 4. ○ If the requested assets are not available, or if additional assets must still be sourced, the workflow proceeds to step 2. **2.** The asset sourcing AI agent checks if the requested assets are available in any non-local stockrooms. ○ If the requested assets are available, the AI agent checks if the **Auto-transfer** option is enabled for any stockrooms that those assets are located in. ▪ If the **Auto-transfer** option is enabled, the AI agent triggers the transfer order creation AI agent. This AI agent creates a transfer order to move the requested assets from a source stockroom to a destination stockroom. If multiple source or destination stockrooms are available, the AI agent requests user input when creating the transfer order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow stages (continued)

Stage	Steps
	Note: In this scenario, non-local stockrooms act as source stockrooms, while local stockrooms act as destination stockrooms. ▪ If the **Auto-transfer** option is disabled, the workflow proceeds to step 4. ○ If the requested assets are not available, or if additional assets must still be sourced, the workflow proceeds to step 3. **3.** The asset sourcing AI agent checks if the **Auto-purchase** option is enabled for any local stockrooms. ○ If the **Auto-purchase** option is enabled, the AI agent triggers the purchase order creation AI agent. This AI agent creates a purchase order to obtain assets from a specified vendor. If multiple vendors are available, the AI agent requests user input when creating the purchase order. ○ If the **Auto-purchase** option is disabled, the workflow proceeds to step 4. **4.** If the requested assets cannot be sourced automatically, user intervention is required. **a.** The asset sourcing AI agent creates sourcing plans to confirm how it should proceed with sourcing each requested asset. **b.** The AI agent launches the ServiceNow Otto panel to initiate a conversation with each user who is assigned to a requested asset. **c.** After reviewing the sourcing plan for an assigned asset, each user must either accept or reject the plan. **d.** Depending on whether a user accepts or rejects a sourcing plan, the workflow proceeds as follows: ▪ If a user accepts a sourcing plan without requesting any modifications, the relevant AI agent sources the asset accordingly. **Note:** If any modifications are required at a later time, the user must re-initiate the conversation in the ServiceNow Otto panel. ▪ If a user rejects a sourcing plan, the requested asset must be sourced manually.

AI agents used in the help manage enterprise asset requests agentic workflow

The help manage enterprise asset requests agentic workflow uses the following AI agents to execute tasks for fulfilling enterprise asset requests.

AI agents and their roles in the help manage enterprise asset requests agentic workflow

AI agent	AI agent role
Asset sourcing AI agent	Initiates the sourcing process for a requested asset. The AI agent prioritizes sourcing the asset from a local stockroom. If the asset is not available, or if the corresponding asset sourcing option is not enabled, the AI agent can trigger one of

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AI agents and their roles in the help manage enterprise asset requests agentic workflow (continued)

AI agent	AI agent role
	the following order creation AI agents to create either a transfer order or purchase order for the asset: • Transfer order creation AI agent to create a transfer order • Purchase order creation AI agent to create a purchase order
Transfer order creation AI agent	Sources the requested asset by creating a transfer order. If you have multiple source or destination stockrooms, the AI agent requests user input when creating the transfer order.
Purchase order creation AI agent	Sources the requested asset by creating a purchase order. If you have multiple destination stockrooms or vendors, the AI agent requests user input when creating the purchase order.

Manually fulfill enterprise asset requests by using the enterprise asset request flow

Use the enterprise asset request flow to request, source, and deploy catalog items from the Service Catalog application.

Before you begin

Before requesting for an enterprise asset, confirm that you have already created a model for that asset in the Enterprise Asset Workspace and published that model to the Service Catalog application.

Role required:

- catalog_admin
- procurement_admin
- sn_eam.enterptrise_asset_manager
- sys_admin

About this task

Create a request for an enterprise catalog item from the Service Catalog application. Associate the catalog item with the Standard Enterprise Asset Request flow to trigger the flow.

The Workflow Studio application is used to create the Standard Enterprise Asset Request flow to take you through the process of sourcing, procuring, and deploying your enterprise catalog items. As the flow takes you through the various stages, the asset details are automatically updated. You can open the Standard Enterprise Asset Request flow to view the status of the stages in the flow.

Procedure

1. Log in with credentials for the role of catalog_admin and navigate to **Service Catalog** > **Maintain Items**.
2. Open the enterprise catalog item and in the **Flow** field, select **Standard Enterprise Asset Request**.
   If the **Flow** field is not visible, add it to the form layout by right-clicking the menu icon and navigating to **Configure** > **Form layout**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select **Save**.
   The Standard Enterprise Asset Request flow is now associated with the enterprise catalog item.
4. Navigate to the Service Catalog application.
5. Login with credentials for the role of sys _admin role and add the **Enterprise Assets** catalog.
   The **Enterprise Assets** catalog is not on the Service Catalog page by default. To add this catalog, select the Add Content icon beside the search catalog bar and then select **Enterprise Assets**
6. Login with credentials for the role of sn_eam.enterprise_asset_manager and select the **Enterprise Assets** catalog.
   The Enterprise Assets page opens.
7. Select your catalog item from the list.
   The catalog item page opens.
8. In the **Location** field, select the location in which you want to deploy the catalog item.
9. Select **Order Now**.
10. Log in with credentials for the role of procurement_admin and open the new request.
11. In the Requested Items related list, select the request item.
12. Select the **Catalog Tasks** related list to view the sourcing task for the request.
13. Open the catalog task and select **Source Request**.
14. In the Source Request form layout, select **Add Transfer Order** or **Add Purchase Order** to source the request via a transfer order or a purchase order.
    After you procure the catalog item, the Asset pick task is created for the Requested item only if the asset is sourced from the stockroom that has the Asset pick task enabled. Otherwise the Deployment task is created for the Requested item without the Asset pick task. For details, see Enable the Asset pick task for your stockroom in the Hardware Asset Workspace.
15. Select the Requested items related list and select the requested item.
16. Select the **Catalog Tasks** related list.
    - If the Pick task is enabled for the source stockroom, complete the Asset pick task first and then complete the Deploy task.
    - If the Pick task isn't enabled,complete the Deploy task.
17. Complete the Asset pick task using the Mobile Agent application.
    For details on completing this step, see Manage enterprise asset pick tasks using the Mobile Agent application.
    The Deployment task is created for the requested item.
18. Enter a value in the **Assigned to** field, and select **Deploy Asset**.
    If it's a serialized asset, it's marked as **In use** state. If it’s a consumable asset, it’s marked as **Consumed** state. In the Standard Enterprise Asset Request flow, the action that is associated with deploying the assets is now complete.

Request an enterprise asset refresh

Use the Enterprise Asset Refresh flow to track the assets that are nearing the end of their life cycle and replace them with new assets.

Before you begin

Role required: inventory_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

When assets get old, their maintenance costs and risks of failure increase, while their performance decreases. You can choose to replace old assets with the same or different models of newer assets. After your Enterprise Asset Refresh request is approved, the Enterprise Asset Refresh flow takes you through sourcing and triggers the Enterprise Asset Refresh Line flow. The Enterprise Asset Refresh Line flow uses Refresh Line tasks to take you through the steps of preparing the new asset, scheduling it for delivery, deploying it, and reclaiming the aged asset.

The Workflow Studio application is used to create the Enterprise Asset Refresh flow and the Enterprise Asset Refresh Line flow.

Procedure

1. Navigate to the Service Catalog application.
2. Login with credentials for the role of sys _admin role and add the **Enterprise Asset Lifecycle** catalog.
   The **Enterprise Asset Lifecycle** catalog is not on the Service Catalog page by default. To add this catalog, select the Add Content icon beside the search catalog bar and then select **Enterprise Asset Lifecycle**.
3. Login with credentials for the role of sn_eam.enterptrise_asset_manager and select the **Enterprise Asset Lifecycle** catalog.
   The Enterprise Asset Lifecycle page opens.
4. Navigate to **Service Catalog** > **Enterprise Asset Lifecycle**.
   The **Enterprise Asset Lifecycle** catalog is not on the Service Catalog page by default. To add this category, select the add content icon beside the search catalog bar and then select **Enterprise Asset Lifecycle**.
5. Open **Enterprise Asset Refresh Order**.
6. If you want to replace all the aged enterprise assets with the same model of new enterprise assets, do the following:

   a. Select **Single model** from the **Type of refresh list** field.

   b. On the form, fill in the fields.

Enterprise Asset Refresh form

Field	Description
Location	Physical location of the aged enterprise assets.
Replacement model	New enterprise asset model that you want to replace the aged enterprise assets with. **Note:** For single and multi-model refresh orders, the OT manager can edit the replacement model even after the refresh order has been created in the OTAM workspace
Assets	Aged enterprise assets that you want to replace. You can use a filter to search for enterprise assets that you want to replace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Available	Displays only those assets for which the **Eligible for Refresh** check box on the Asset page is selected. To view all assets that are nearing their end of life, execute the condition `Eligible for refresh is false`. **Note:** For details on the **Eligible for Refresh** check box, see Asset fields for enterprise assets.

7. If you want to replace the aged hardware assets with different models of new hardware assets, do the following:

   a. Select **Multi model** from the **Type of refresh** field.

   b. Select **Add**.

   c. For each new enterprise asset that you want to use, add a row to enter the enterprise model.

   Note: You can create 50 rows. You cannot create multiple rows for the same aged hardware asset that you want to replace.

8. Select **Order Now**.
   An Order status page appears and displays the details of the order. A request is created to source the new enterprise assets and to replace the aged enterprise assets. The Request form shows the total price of all the new enterprise asset models.

Replace aged enterprise assets

Replace aged enterprise assets by sourcing new enterprise assets.

Before you begin

Role required: inventory_user

About this task

When refreshing enterprise assets, you don't have to manually update the asset records. When closing the enterprise asset refresh lines, the asset records and the assets are automatically updated. Close each task to go to the next task, complete the refresh, and reclaim the aged assets.

After sourcing the new assets, asset refresh is completed through the following stages:

- Prepare asset task: Prepare the new asset before you hand it over to the user. For example, install any software that's required.
- Schedule refresh task: Schedule a date to hand over the asset to the requester.
- Deploy new asset: Hand over the asset to the requester or install the asset at the requester's location if necessary.
- Reclaim aged asset: Collect the aged asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Select the hardware asset refresh request.

Interface	Action
Core UI	**a.** Navigate to **All** > **Service Catalog** > **Open Record** > **Requests**. **b.** Select the request number of the enter prise asset refresh request that you want to fulfill.
Enterprise Asset Workspace	**a.** Navigate to **All** > **Enterprise Asset Work space** > **Procurement view**. **b.** Select the **Requests** tab. **c.** Select the request number of the enter prise asset refresh request that you want to fulfill.

   After your enterprise asset refresh request is approved, the following events happen:

   - The Source Request flow is triggered to source new assets.
   - In the **Catalog Tasks** tab, a catalog task is created for the procurement of the new enterprise asset.

2. Under the Requested Item related list, open a requested item.
   After your enterprise asset request is approved, the Source Request flow is triggered. Under the Catalog tasks related list, a catalog task is created for the procurement of the new enterprise assets.
3. Source items in the request.
   You can source items in the request by consuming the local stock, through purchase orders, or through transfer orders.

   For more details on sourcing items, see Sourcing items in a service catalog request.

   After the new asset is received, the following events happens:

   - The Enterprise Asset Refresh Line flow is triggered for the asset.
   - The Enterprise Asset Refresh Line tab is displayed next to the Asset Tasks tab on the requested item form.
   - The Asset pick task is created under the Refresh Line Tasks only if the requested item is consumed from the local stockroom for which the Asset pick task is enabled. Otherwise the Prepare asset task is created directly without the Pick task. For details, see Enable the Asset pick task for your stockroom in the Enterprise Asset Workspace.
4. Select the **Enterprise Asset Refresh Line** tab.
5. Select the enterprise asset refresh line.
6. Select the **Refresh line tasks** tab.
7. Complete the Asset pick task by using the Mobile Agent application.
   For details on completing this step, see Locate and pick the enterprise assets in your stockroom using the Mobile Agent application.
8. Prepare the asset.
   a. Select the **Prepare asset** task.
   b. In the **Asset** field, select the enterprise asset that you want to replace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select **Save**.

d. Select **Close Task**.

- A Schedule refresh task is created under the Refresh Line Tasks.
- The state of the Replacement asset changes to In stock.
- The substate changes to Reserved.
- The **Reserved for** field is populated with the requester details.

9. Complete the Schedule refresh task.

a. Select the **Schedule refresh** task.

b. In the **Scheduled deployment date** field, select the date on which the new asset will be deployed.

c. Select **Close Task**.

- The Deploy new asset task is created under the Refresh Line Tasks.
- The state of the Replacement asset changes to In stock and the substate changes to Pending install.

10. Complete the Deploy new asset task.

a. Select the **Deploy new asset** task.

b. Confirm if you have reclaimed the old asset in the **Is reclaimed** list.

- If you've collected the aged asset, select **Yes**.
- If you didn't collect the aged asset, select **No**.

c. Select **Close task**.

Note: If you select **Yes** from the Is reclaimed list, then the Reclaim aged asset task is also closed by default.

- Reclaim aged asset task is created under the Refresh Line Tasks.
- The state of the replacement asset changes to In use.
- The allocations are transferred from the aged asset to the replacement asset.

11. Complete reclaiming the aged assets.

a. Select the **Reclaim aged asset** task.

b. Confirm if you have reclaimed the old asset in the **Is reclaimed** list.

- If you've collected the aged asset, select **Yes**.
- If you didn't collect the aged asset, select **No**.

c. Select **Close task**.

Note: You can cancel the enterprise asset Refresh Line either by selecting **Cancel** or by changing the **State** field to **Closed Incomplete** in the Refresh Line task.

Result

After the aged enterprise asset is reclaimed, the following changes happen on the asset form:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The state of the aged asset changes to In stock.
- The substate changes to Pending disposal.

Create an asset resale flow

Create an asset resale flow for an asset to be resold in order to reduce waste and save cost.

Before you begin

Role required: sn_eam.enterprise_asset_manager

About this task

The asset vendor must confirm which assets can be resold and how much they are worth.

Only assets that are in a non-terminal state, which is any state in which the asset can transition into a different state, can be resold through a enterprise resale order. Each asset must also be associated with either an enterprise model or pallet model. You can add simple assets; multi-component assets, which include pre-assembled and user-assembled assets; and pallet assets with children to an enterprise resale order.

Note: If you are adding a pallet asset with children to a resale order, any changes that you make to the pallet asset are automatically applied to all child assets.

Procedure

1. Navigate to the **Service Catalog** > **Enterprise Asset Lifecycle**.
2. Select Enterprise Resale Order.
3. On the form, fill in the fields.
4. Add assets and submit the order.
   Once the asset resale request is submitted, you can fulfill the request by navigating to the Enterprise Asset Workspace.
5. Navigate to **Inventory** > **Resale orders**.
6. Next go through each task.
7. Select Verify Asset to select assets and verify them.
   Before completing the Verify Asset task, you can add or remove assets from the disposal order. You can also edit the quantity of consumables.
8. Select Close task.
   The next task in the workflow, Schedule pickup, is automatically created and appears in the **Enterprise Asset Resale Tasks** tab
9. Select Schedule Pickup to specify when the asset can be picked up from the stockroom as well as the vendor details
10. Select Close task.
    The stage changes to in transit and the Asset departure task is created.
11. Select the Asset departure task and select each asset departing for resale as well as pickup contact details,
12. Select Close task.
    The stage changes to confirmation and the Vendor confirmation task is created.
13. Select the Vendor confirmation task once the vendor confirms that the assets were received.
14. Select Close task.
    The stage changes to documentation and a Resale Documentation task is created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a catalog request for onboarding multiple assets

Create a catalog request for onboarding multiple assets on a single model.

Before you begin

Role required: enterprise_asset_technician

About this task

A minimum of one asset is required to submit a catalog request. Each catalog request may include a maximum of 50 assets.

Procedure

1. Navigate to **Service Portal** > **Request Something** > **Enterprise Asset Lifecycle**.
   You can also navigate to the **Enterprise Asset Lifecycle** via the Service Catalog.
2. Select **Assets Onboarding**.
   The Asset Onboarding page opens.
3. On the form, fill in the fields.

Field	Description
Due by	Date by when the asset onboarding must be complete. This field is optional.
Requested for	Person for whom the asset is requested. This field is optional.
Stockroom	Select a stockroom for the assets.
Is new model?	Select this check box for a new model you want to create. Once selected, enter the fol lowing information. ○ Manufacturer ○ Model name ○ Model number ○ Short description **Note:** The above information is collect ed for creating a model record. The mod el record gets created in the Enterprise Asset Workspace.
Model	Select an existing model record for the as sets.
Add	Select to enter information for creating new assets. In the Add Row dialog box, enter the following information and then select **Add**: ○ Serial number ○ Asset tag

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ MAC address ○ RFID tag ○ Comments To enter another asset, select **Add** again. **Note:** The above information is col lected for creating an asset. The asset record gets created Enterprise Asset Workspace by the enterprise asset man ager.

4. Select **Submit**.
   After the catalog request is submitted, a requested item is created. An asset onboarding task is also created associated to the requested item which triggers the multi-asset playbook.

What to do next

The enterprise_asset_manager role can launch the multi-asset playbook from the Enterprise Asset Workspace.

Enterprise asset reclamation

Use a reclamation workflow to coordinate an employee's offboarding process that lets you request, assess, and reclaim enterprise assets.

When an employee leaves an organization or moves to a different role, retrieving the assets assigned to the employee needs extensive coordination between the Human Resources department and the enterprise asset managers. You can create an offboarding service catalog request, which initiates a prescriptive workflow to efficiently retrieve assets and restock them in the inventory, reassign them, send them for repair, or dispose as required.

You can create an asset reclamation request via the Service Catalog application. After the request is created, reclamation line items are created that comprise a series of tasks. These tasks can only be accessed and performed by the sam_user role. After all the tasks are closed, the reclamation line item is complete. After all the reclamation line items are complete, the catalog request is also completed.

Note: To use the Service Catalog application to reclaim enterprise assets, you must install the Enterprise Asset Management application.

When you create a reclaim asset request via the Service Catalog application, an asset reclamation request is created. For each enterprise asset assigned to the departing employee, an enterprise asset reclamation line is created for the assets you select in the Reclaim Asset Service Catalog. Each enterprise asset reclamation line is closed through the following Enterprise Asset Reclamation Tasks:

- Schedule drop off, Schedule pickup, or Schedule shipment task based on which reclamation method you select in the Reclaim Asset form
- Receive asset
- Evaluate

The Enterprise Asset Reclamation Line also has a stage field, which changes when you close a Enterprise Asset Reclamation Task as follows:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Pending
- Pending evaluation
- Complete

Create a catalog request to reclaim enterprise assets

Create a catalog request to efficiently reclaim enterprise assets when an employee leaves an organization or moves to a different role.

Before you begin

Role required: any employee in your organization.

Procedure

1. Navigate to the Service Catalog application.
2. On the Service Catalog page, enter `Reclaim asset` in the Search catalog field on the right-hand side of the page.
3. Select **Reclaim Asset**.
4. On the form, fill in the fields.

Reclaim Asset form

Fields	Description
Requested by	The role of the person who is creating this request. Select from the following options: ○ **HR** ○ **Manager** ○ **User** ○ **Asset Manager** (only if the request is being created by the enterprise_asset-manager role or the asset role)
Requested for	Name of the person for who you are submitting the catalog request. **Note:** This field is not mandatory if the request is being created by the enterprise_asset_manager role.
Employee separation	Whether the person for who you are submitting the asset reclamation is leaving the organization or moving to a different role.
Asset	Assets assigned to the person for who you are submitting the asset reclamation.
Reclaim date	The date by which you want the asset reclaimed by. You can enter today's date or a date in the future.
Reclaim method	The method you intend to use to collect the assets from the departing employee. You can

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Fields	Description
	pick up the assets, the employee can drop them off, or ship them to the organization.
Legal hold method	If the assets need to be kept on hold because of any legal reasons.
Notes/Special instructions	Any instructions that you may want to mention.

5. Select **Submit**.
   The enterprise asset reclamation request is created. Once the request is created, the enterprise_asset_technician role navigates to the Enterprise Asset Workspace to view the reclamation line and complete the tasks. For more details, see Close an enterprise asset reclamation request.

Managing enterprise assets and tasks using the Mobile Agent application

Create and manage enterprise assets, asset tasks, and work order tasks using the intuitive Mobile Agent application.

Overview of the Mobile Agent application

Use the Mobile Agent application to perform the following tasks.

Task	Role required	Resource
Create and lookup enterprise asset		• Create an enterprise asset in the Mobile Agent application • Look up enterprise assets using the Mobile Agent application
Scan enterprise assets for stockroom and location inventory audits		• Complete a single scan enterprise asset inventory audit using the ServiceNow Agent app • Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app
Verify and depart your enterprise assets as part of the disposal process		Verify and depart your enterprise assets for disposal using the Mobile Agent application
Manage your work order tasks and asset tasks		Manage an Enterprise Asset Management task using the Mobile Agent application

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Task	Role required	Resource
Manage the repair of your enterprise assets		Manage enterprise asset repair tasks using the Mobile Agent application
Manage the asset pick tasks assigned to you.		Manage enterprise asset pick tasks using the Mobile Agent application

Create an enterprise asset in the Mobile Agent application

Use the ServiceNow® Mobile Agent application to create a serialized or multi-component enterprise asset.

Before you begin

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

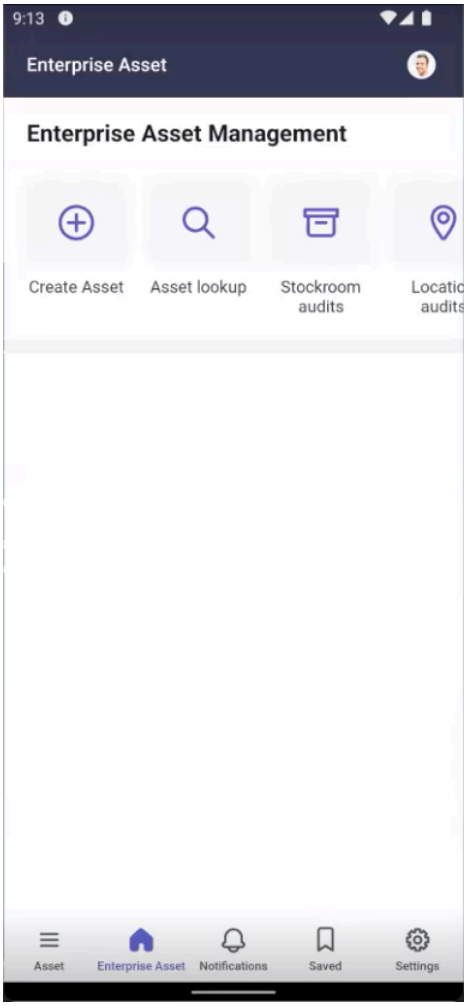
About this task

Important: The enterprise assets that you create through the Mobile Agent application can be associated only with enterprise models that are classified through the Enterprise good model [sn_ent_model] class within the Configuration Management Database (CMDB) class hierarchy. See Expanded Model and Asset Classes for more information on enterprise model classes.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **Enterprise Asset** tab.
   The navigation bar displays tabs for the ServiceNow applications and applets that you have access to through the Mobile Agent application. The navigation bar also displays tabs for your Mobile Agent application settings and notifications.
   The home screen for the Enterprise Asset Management application opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



3. Tap **Create Asset**.
   The Serial Number screen opens.
4. **Optional:** If your enterprise asset contains a serial number, scan or enter the serial number to verify if the asset already exists.
   If you want to skip this verification, tap the back arrow at the top left corner of the screen to proceed directly to the Create Asset form. You can then proceed either to step 5 to verify the asset existence based on asset tags or to step 6 to skip both verifications and continue with the asset creation process.

   a. Use the camera on your mobile device to scan the serial number.
      You can also enter the serial number manually in the **Serial Number** field.

   b. Depending on whether the enterprise asset exists or not, proceed with one of the following options:

      - If the enterprise asset already exists, verify the asset details in the corresponding asset record:

        i. Return to the home screen for the Enterprise Asset Management application.

        ii. (Optional) Tap **Asset lookup**.

            The Asset lookup screen opens.

        iii. Use the camera on your mobile device to scan the asset tag of the enterprise asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

iv. (Optional) Tap **Submit**.

v. (Optional) From the list of corresponding asset records, tap the asset record through which you want to verify the asset details.

The asset record opens.

vi. Verify all asset details for the given enterprise asset.

vii. Update any asset details if needed.

- If the enterprise asset does not already exist, proceed to step 7 to continue with the asset creation process.

5. **Optional:** If your enterprise asset contains an asset tag, scan the asset tag or enter the asset tag value to verify if the asset already exists.
If you want to skip this verification, proceed directly to step 6 to continue with the asset creation process.

a. On the Create Asset form, tap the **Asset Tag** field.

b. Use the camera on your mobile device to scan the asset tag.
You can also enter the asset tag value manually in the **Asset Tag** field.

c. Depending on whether the enterprise asset exists or not, proceed with one of the following options:

- If the enterprise asset already exists, verify the asset details in the corresponding asset record:

i. Return to the home screen for the Enterprise Asset Management application.

ii. (Optional) Tap **Asset lookup**.

The Asset lookup screen opens.

iii. Use the camera on your mobile device to scan the asset tag of the enterprise asset.

iv. (Optional) Tap **Submit**.

The list of corresponding asset records opens.

v. (Optional) Tap the asset record through which you want to verify the asset details.

The asset record opens.

vi. Verify all asset details for the given enterprise asset.

vii. Update any asset details if needed.

- If the enterprise asset does not already exist, proceed to step 7 to continue with the asset creation process.

6. On the Create Asset form, tap **Submit**.
The complete list of your enterprise assets opens.
7. Tap the more options menu at the top right corner of the screen.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. When the menu opens, tap **Create Asset**.
   The Asset Tag screen opens.
9. Depending on whether your enterprise asset does or does not contain an asset tag, proceed with one of the following options:
   - If your enterprise asset contains an asset tag, use the camera on your mobile device to scan the tag. You can also enter the asset tag value manually in the **Asset Tag** field. After you successfully scan the asset tag or enter the asset tag value, tap the back arrow at the top left corner of the screen to proceed to the Create Asset form. The **Asset Tag** field on the Create Asset form automatically updates with the asset tag value that you scanned or entered.
   - If your enterprise asset does not contain an asset tag, tap the back arrow at the top left corner of the screen to skip the asset tag scan and proceed directly to the Create Asset form.
10. If your enterprise asset contains a serial number, scan or enter the serial number.

    a. On the Create Asset form, tap the **Serial Number** field.
    The Serial Number screen opens.

    b. Use the camera on your mobile device to scan the serial number.
    You can also enter the serial number manually in the **Serial Number** field.

    c. Tap the back arrow at the top left corner of the screen to return to the Create Asset form.
    The **Serial Number** field on the Create Asset form automatically updates with the serial number that you scanned or entered.

11. Associate the enterprise asset with an enterprise model.

    a. On the Create Asset form, tap the **Model** field.
    The Model screen opens.

    b. From the list of available enterprise models, select the model that you want to associate the enterprise asset with.
    The screen closes and you return to the Create Asset form.

    The **Model** field on the Create Asset form automatically updates with the enterprise model that you selected.
12. Specify the state of the enterprise asset.

    a. On the Create Asset form, tap the **State** field.
    The State screen opens.

    b. From the list of available states, select the current state of the enterprise asset.
    The screen closes and you return to the Create Asset form.

    The **State** field on the Create Asset form automatically updates with the state that you selected. Based on this selected state, additional fields appear on the Create Asset form.
13. Based on the enterprise asset state that you specified in step 11, fill in the additional fields that appear on the Create Asset form.
14. Tap **Submit**.
    The form closes and you automatically return to the home screen for the Enterprise Asset Management application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The enterprise asset is created along with a corresponding configuration item (CI).

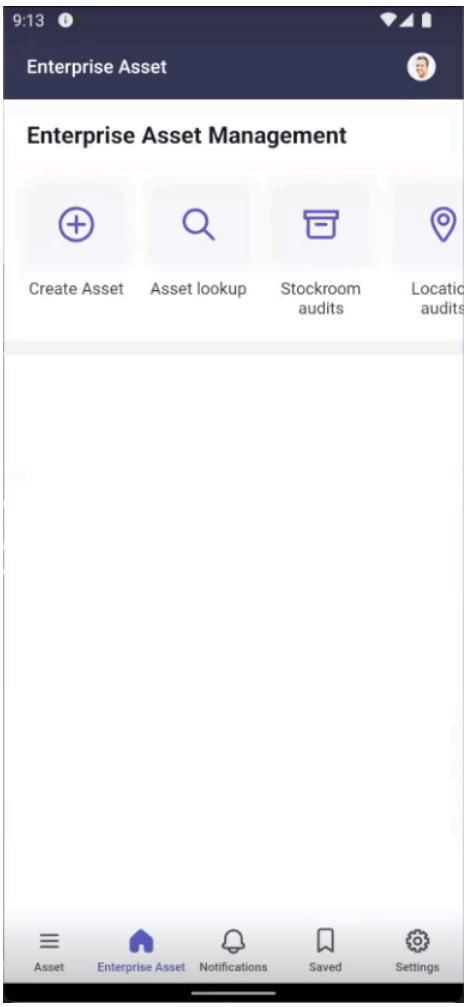
Look up enterprise assets using the Mobile Agent application

Use the ServiceNow® Mobile Agent application to look up asset records so that you can view or update your enterprise asset details.

Before you begin
Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **Enterprise Asset** tab.
   The navigation bar displays tabs for the ServiceNow applications and applets that you have access to through the Mobile Agent application. The navigation bar also displays tabs for your Mobile Agent application settings and notifications.
   The home screen for the Enterprise Asset Management application opens.



3. Tap **Asset lookup**.
   The Asset lookup screen opens.
4. Use the camera on your mobile device to scan the asset tag of the enterprise asset that you want to look up.
   You can also enter the asset tag value manually in the **Asset tag** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Tap **Submit**.
   The list of corresponding asset records opens.
6. Tap the asset record that you want view or update.
   The asset record opens.
7. View or update the asset details as needed.

Manage enterprise asset inventory audit using the ServiceNow Agent app

Use the ServiceNow Agent application to scan the enterprise assets that you want to include in your stockroom inventory audits. After you scan all enterprise assets, you can complete the audit on your ServiceNow instance.

Create an enterprise audit record using the ServiceNow Agent app

Create an inventory audit record using the ServiceNow Agent app.

Before you begin

Role required: sn_eam.enterprise_admin, sn_eam.enterprise_asset_manager, sn_eam.asset_technician, sn_itam_common.asset_audit_user, or sn_itam_common.asset_audit_admin

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **Enterprise Asset** tab.
3. Select the audit that you want to perform.

Audit type	Action
To perform stockroom audits	**a.** On the navigation bar, tap the Stockroom audits menu. **b.** Tap the more actions icon ( ). **c.** Tap **New stockroom audit**.
To perform location audits	**a.** On the navigation bar, tap the Location au dits menu. **b.** Tap the more actions icon ( ). **c.** Tap **New location audit**.

4. On the form, fill in the fields.

New stockroom audit form or New location audit form

Field	Description
Stockroom **Note:** This field appears if you're creating a stockroom audit.	Stockroom where you want to perform the audit.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Location **Note:** This field appears if you're creating a location audit.	Location where you want to perform the audit.
Aisle and space **Note:** This field appears if you're creating a stockroom audit.	Aisle and space for which you want to perform the audit.
Include child locations **Note:** This field appears if you're creating a location audit.	Option to include child locations in the audit.
Model category	Model category for which you want to perform the audit.
Include consumables **Note:** This field appears if you're creating a stockroom audit.	Option to include consumable assets in the inventory audit. The available options are: ○ Yes ○ No The default populated value for this field is derived using the *sn_itam_common.set_default_include_consuma* system property. ○ When this system property value is set to **yes**, the default value for the **Include consumables** field is set to **Yes**. ○ When this system property value is set to **no**, the default value for the **Include consumables** field is set to **No**.
Scan method	Scan method to be used to scan the assets. The available options are: ○ Single scan ○ Multi scan ○ When the **Include consumables** field is set to **Yes**, the **Scan method** field value is automatically set to **Single Scan** and can't be edited. ○ When the **Include consumables** field is set to **No**, the **Scan method** field becomes editable, enabling you to select the scan type. Depending on the selected scan method for the audit record, you can scan the assets in the inventory using the ServiceNow Agent app.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ To complete asset scanning for the single scan audit record, see Complete a single scan enterprise asset inventory audit using the ServiceNow Agent app. ○ To complete asset scanning for multi scan audit records, see Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app.

5. Tap **Submit**.

Result

- An audit record is created and listed on the **Open** tab.
- The audit result fields are displayed on the audit **Details** tab.

  For a detailed description of the audit result field values, see Audit results.

What to do next

Scan the assets in the inventory using the ServiceNow Agent app.

Related topics

Complete a single scan enterprise asset inventory audit using the ServiceNow Agent app

Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app

Complete a single scan enterprise asset inventory audit using the ServiceNow Agent app

Scan your inventory assets by using the ServiceNow Agent app for single scan audit records.

Before you begin

Role required: sn_eam.enterprise_admin, sn_eam.enterprise_asset_manager, sn_eam.asset_technician, sn_itam_common.asset_audit_user, or sn_itam_common.asset_audit_admin

Procedure

1. From your mobile device, launch the ServiceNow Agent application.
2. On the navigation bar at the bottom of the screen, tap the **Enterprise Asset** tab.
3. Select the stockroom or location audit record.
4. Tap **Start audit**.

   Note: This button appears only for the location audit.

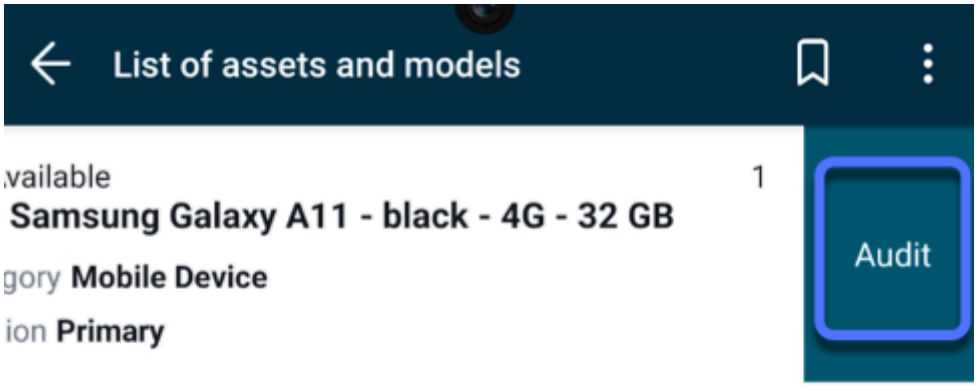
5. Select **Scan**.
   The Asset scan page is displayed.
6. In the **Asset tag/Serial number/Model barcode** field, enter or scan the asset tag, serial number, or model barcode of the asset.
7. Tap **Next**.
8. **Optional:** Select an **Aisle and space**.
9. Select **Submit**.
   The List of assets and models screen is displayed, showing the scanned asset record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: When the scanned asset record doesn't exist in your ServiceNow instance, the List of assets and models screen is empty. You can create an asset record for the new asset in the inventory. For more information, see Create an enterprise asset from the inventory audit screen.

10. On the List of assets and models screen, slide the scanned asset record to the left side. The Audit option is displayed on the screen.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

11. Tap **Audit**.
    The **Details** tab screen is displayed. The audit result field values are automatically updated when you scan the stockroom assets.
12. After you're finished scanning assets, mark the audit as complete.

    a. Tap the three dots icon in the navigation bar.

    b. Tap **Complete**.
    A confirmation message appears on the audits page.

    Note: You can start a new scan as many times as you need while the audit is in progress. After you mark the audit as **Complete**, you can't scan any more assets.

Result

The audit result field values are updated on the **Details** tab screen. For a detailed field description, see Audit results.

What to do next

- Review the inventory audit result.
- Tap the audit result field values to view the detailed list of the assets.

Related topics

Audit results

Create an enterprise asset from the inventory audit screen

Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app

Scan your inventory assets by using the ServiceNow Agent app for the multi scan audit records.

Before you begin

Role required: sn_eam.enterprise_admin, sn_eam.enterprise_asset_manager, sn_eam.asset_technician, sn_itam_common.asset_audit_user, or sn_itam_common.asset_audit_admin

Procedure

1. From your mobile device, launch the ServiceNow Agent application.
2. On the navigation bar at the bottom of the screen, tap the **Enterprise Asset** tab.
3. Select the stockroom or location audit record.
4. Tap **Start audit**.

   Note: This button appears only for the location audit.

5. Select **Scan**.
   The Asset scan screen is displayed.
6. Scan or enter the asset tag in the **Asset Tag** field.
   You can scan or enter the asset tag for one or more assets.
7. **Optional:** Select the **Review** tab to review the list of scanned assets.
   On the review screen, you can delete assets if needed. However, Enterprise Asset Management automatically removes duplicates for assets that you accidentally scan twice.
8. Tap **Next**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. **Optional:** Select an Aisle and space.
10. Select **Submit**.
    The Stockroom audit **Details** tab screen is displayed.

    Note: If the scanned asset record doesn't exist in your ServiceNow instance, a new asset record is created using the provided Asset tag. The new asset record is created with an unknown product model and an unknown model category value. Additionally, an asset remediation task is also created to notify you that an asset record has been created with an unknown model category and an unknown product model. Open the asset remediation task from the Hardware Asset Workspace and update the **Model category** and **Model** fields value for the asset. For more information, see Close an enterprise asset remediation task.

11. After you're finished scanning assets, mark the audit as complete.

    a. Tap the three dots icon in the navigation bar.

    b. Tap **Complete**.
    A confirmation message appears on the audits page.

    Note: You can start a new scan as many times as you need while the audit is in progress. After you mark the audit as **Complete**, you can't scan any more assets.

Related topics

Close an enterprise asset remediation task

Create an enterprise asset from the inventory audit screen

Create an enterprise asset record for the scanned asset that doesn't exist in your ServiceNow instance and that is detected when auditing inventory.

Before you begin
Role required: asset, and sn_itam_common.asset_audit_admin, or sn_itam_common.asset_audit_user

About this task
When scanning an asset in the inventory, if a new asset is detected that doesn't exist in your ServiceNow® instance, you can create a record for it. You can add the asset directly from the audit screen in the ServiceNow Agent app.

Note: This procedure applies when you scan assets for a single scan audit record.

Procedure
1. From your mobile device, launch the ServiceNow Agent application.
2. On the navigation bar at the bottom of the screen, tap the **Enterprise Asset** tab.
3. Select the stockroom or location audit record.
4. Tap **Start audit**.

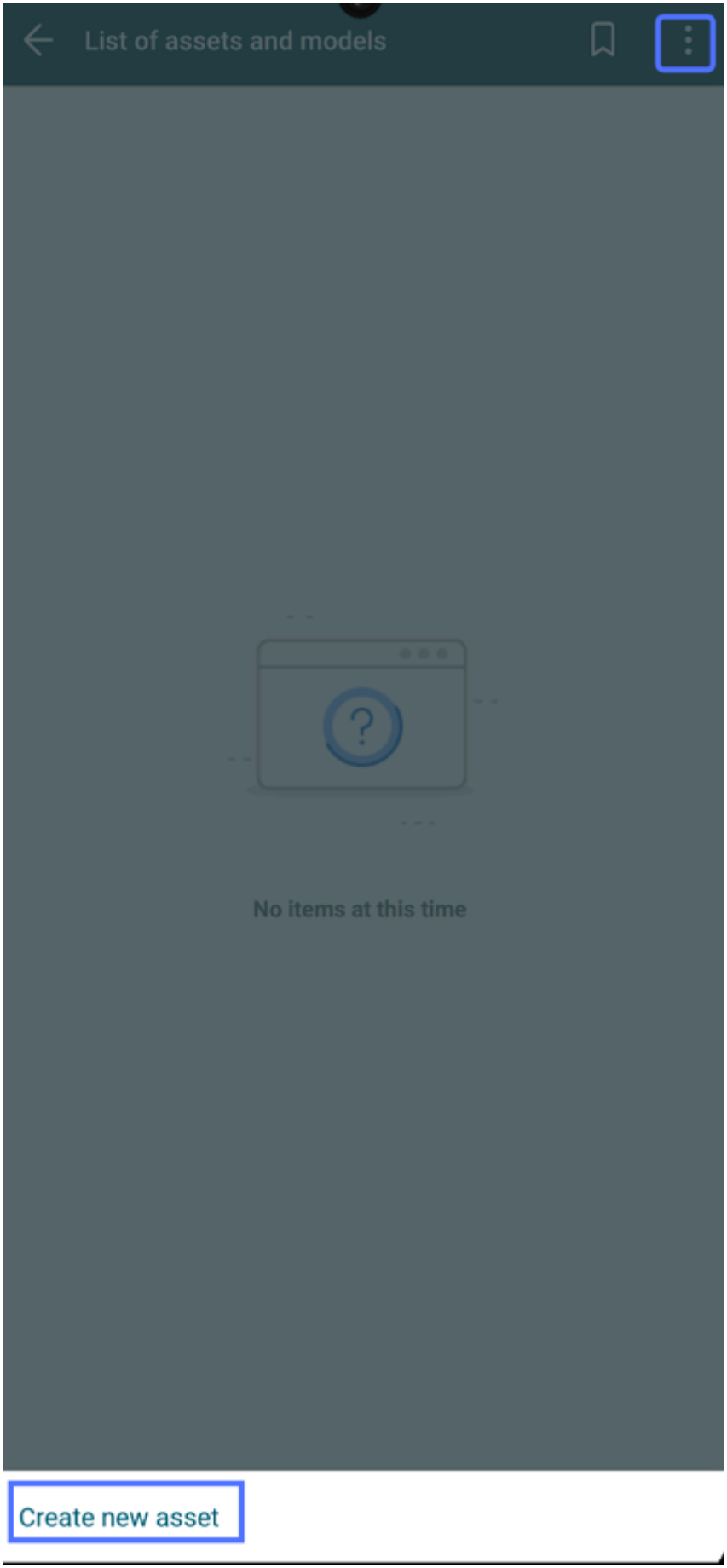
   Note: This button appears only for the location audit.

5. Select **Scan**.
   The Asset scan page is displayed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. In the **Asset tag/Serial number/Model barcode** field, enter or scan the asset tag, serial number, or model barcode of the asset.
7. Tap **Next**.
8. **Optional:** Select an **Aisle and space**.
9. Select **Submit**.
   The List of assets and models screen is displayed.
10. Tap the three dots icon  .
11. Tap **Create new asset**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



The Create asset from audit screen is displayed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

12. On the form, fill in the following fields.

Create asset from audit screen

Model	The product model of the asset.
Stockroom	The stockroom where the asset is available.
State	The **State** field value is automatically set to **In stock**. Change this value as needed.
Substate	The **Substate** field value is automatically set to **Available**. Change this value as needed.
Asset Tag	Alphanumeric information assigned by your organization to help track the asset.
Serial Number	Serial number of this asset.
MAC address	MAC address of the mobile device

Note: Depending on the IRE rule configured for the selected **Model** field value, either **Asset Tag**, **Serial Number**, or **MAC address** field value is required to save the audit record.

For more details on these field descriptions, see Asset fields for enterprise assets.

13. Tap **Submit**.
A confirmation message is displayed on the screen, and the asset record is created.

Result

In the audit results, the **New** field value is incremented for each new asset scanned in the inventory.

Verify and depart your enterprise assets for disposal using the Mobile Agent application

Use the ServiceNow® Mobile Agent application to complete the verification and departure of any enterprise assets that you want to dispose of.

Before you begin

Before you can complete the verification or departure of an enterprise asset, create a disposal order for that asset. See Create a disposal order in the Enterprise Asset Workspace for detailed instructions.

Role required: sn_eam.enterprise_admin or sn_eam.enterprise_asset_manager

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **Enterprise Asset** tab.
The navigation bar displays tabs for the ServiceNow applications and applets that you have access to through the Mobile Agent application. The navigation bar also displays tabs for your Mobile Agent application settings and notifications.
The home screen for the Enterprise Asset Management application opens.
3. Tap **Asset disposal**.
The Asset disposal screen opens, where you can view all open verification and departure tasks for your enterprise asset disposal orders.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. If the enterprise assets that are associated with a disposal order require verification, complete the verification task for that disposal order.

   a. On the **Verifications** tab, tap the verification task that you want to complete.
   The Verifications screen opens.

   b. Tap the **Not verified** field to view the complete list of enterprise assets that require verification through this verification task.

   c. Tap the back arrow at the top left corner of the screen to return to the Verifications screen.

   d. Tap **Scan**.
   The Scan and verify assets screen opens.

   e. Use the camera on your mobile device to scan the asset tag of the enterprise asset that you want to verify.
   You can also enter the asset tag value manually in the **Asset Tag** field.

   f. Tap the Enter key on the keyboard of your mobile device.
   The enterprise asset is automatically added to the **Review** tab of the Scan and verify assets screen.

   g. Repeat steps e and f for every enterprise asset that you want to verify.

   h. After you scan or enter the asset tag value for all desired enterprise assets, go to the **Review** tab to verify the complete list.

   If you want to remove any enterprise assets from the list, tap the Delete icon  for that enterprise asset.

   i. Tap **Submit**.
   The Scan and verify assets screen closes and you automatically return to the Verifications screen. On the Verifications screen, the **Expected**, **Verified**, and **Not verified** fields update based on the enterprise assets that you just scanned or entered the asset tag value for.

   j. Tap **Complete**.
   The Verifications screen closes and you automatically return to the Asset disposal screen.

5. If the enterprise assets that are associated with a disposal order require departure, complete the departure task for that disposal order.

   a. On the **Departures** tab, tap the departure task that you want to complete.
   The Departures screen opens.

   b. Tap the **Not departed** field to view the complete list of enterprise assets that require departure through this departure task.

   c. Tap the back arrow at the top left corner of the screen to return to the Departures screen.

   d. Tap **Scan**.
   The Scan and depart assets screen opens.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. Use the camera on your mobile device to scan the asset tag of the enterprise asset that you want departed.
You can also enter the asset tag value manually in the **Asset Tag** field.

f. Tap the Enter key on the keyboard of your mobile device.
The enterprise asset is automatically added to the **Review** tab of the Scan and depart assets screen.

g. Repeat steps e and f for every enterprise asset that you want departed.

h. After you scan or enter the asset tag value for all desired enterprise assets, go to the **Review** tab to verify the complete list.

If you want to remove any enterprise assets from the list, tap the Delete icon for that enterprise asset.

i. Tap **Submit**.
The Scan and depart assets screen closes and you automatically return to the Departures screen. On the Departures screen, the **Expected**, **Departed**, and **Not departed** fields update based on the enterprise assets that you just scanned or entered the asset tag value for.

j. Tap the **Pickup contact name** field.
The Pickup contact name screen opens.

k. In the **Pickup Contact Name** field, enter the name of the person who is picking up the enterprise assets for departure.

l. Tap **Submit**.
The Pickup contact name screen closes and you automatically return to the Departures screen. On the Departures screen, the **Pickup contact name** field updates with the name that you entered.

m. Tap **Complete**.
The Departures screen closes and you automatically return to the Asset disposal screen.

What to do next

Complete the remaining disposal order tasks on your ServiceNow instance. See Enterprise asset disposal order stages for more information on enterprise asset disposal order tasks.

Manage an Enterprise Asset Management task using the Mobile Agent application

Manage all your work order tasks and asset tasks using the intuitive Mobile Agent application.

View your tasks using the Mobile Agent application

View your work order tasks, asset tasks, and asset repair tasks using the Mobile Agent application.

Before you begin

Role required: sn_eam.enterprise_admin, sn_eam.enterprise_asset_manager, or sn_eam.enterprise_asset_technician

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. View all the tasks assigned to you by selecting **See all**.
4. **Optional:** Filter your tasks by field values.
   a. Tap the Filter icon  .
   b. Enter values in the fields by which you want to filter your task: **Due Date**, **Asset**, **Location**, or **Priority**.
5. **Optional:** Sort your tasks.
   a. Tap the Filter icon  .
   b. Tap **Sort by**.
   c. Select the fields by which to sort your tasks.

Assign a group task to yourself using the Mobile Agent application

Claim tasks to work on from the tasks assigned to your assignment group through the Mobile Agent application.

Before you begin

Role required:

- To work on a work order task: wm_agent and sn_eam.enterprise_asset_technician
- To work on Pick Up Asset task: sn_eam.enterprise_asset_technician

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with a **My group task** link and the first few tasks in the list of tasks assigned to you displayed.
3. View the list of tasks assigned to your group by tapping **My group task**.
4. Tap the task that you want to assign to yourself and then tap **Assign to me**.

Result

The assigned task is shown in your My Tasks list.

Start working on tasks using the Mobile Agent application

Indicate in the Mobile Agent application when you start work on a task assigned to you. When you start working on the task, the start time is automatically recorded.

Before you begin

Role required:

- To work on a work order task: wm_agent and sn_eam.enterprise_asset_technician
- To work on Pick Up Asset task: sn_eam.enterprise_asset_technician

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the task that you want to start.
6. On the **Details** tab, tap **Start Work**.

Result

- In the **Details** tab, the **Start Work** link changes to **Complete Work** automatically.
- The more actions icon with the **Pause work** and **Record time** options is displayed in the top-right corner of the screen.
- The start time is automatically recorded.

Record time worked on a task using the Mobile Agent application

Manage and record time worked on work order tasks and asset tasks. After you start working on a task, you can pause and resume work. You can also record the time worked manually.

Pause a task using the Mobile Agent application

Record a break from a work order task or asset task in the Mobile Agent application if you're not continuing to work on it. Resume the task when you start working on it again. The system automatically tracks and calculates the actual time taken to complete the task even though the work was interrupted.

Before you begin

The *work.management.allow.auto.timecard* system property must be enabled for the time cards to be automatically created when you start working on a task.

Role required:

- To work on a work order task: wm_agent and sn_eam.enterprise_asset_technician
- To work on Pick Up Asset task: sn_eam.enterprise_asset_technician

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task you want to pause isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
- To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.

5. Tap the task record that you want to pause.
6. Tap the more actions icon at the top right corner of the screen and then tap **Pause work**.
   On the **Details** tab, the **Close complete** option changes to **Resume work**.
7. Tap **Resume Work** when you're ready to work on the activity again.

Result

Each time you pause or resume work on the task, the actual time you worked on the task is automatically calculated. An entry for the time worked is created in the Time worked time card.

Record time worked for a task manually using the Mobile Agent application

Record time worked on a work order task or asset task manually and provide any additional comments on the task using the Mobile Agent application.

Before you begin

Role required: wm_agent or sn_eam.enterprise_asset_manager

About this task

You can record time for a work order task or an asset task that is in progress.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task for which you want to record time isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the task record for which you want to record time.
6. Navigate to **Record time** from the more actions icon or the **Details** tab.
   - Tap the more actions icon at the top right corner of the screen and then tap **Record time**.
   - On the **Details** tab, tap **Record time**.
7. On the Record time screen, specify the details of the task.

   a. Specify the date in the **Work Date** field.
   By default, this field is set to the current date.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

b. Enter the time duration that you worked on the task in the **Time worked (Hours)** and **Time worked (Minutes)** fields.

c. **Optional:** Provide any additional information in the **Comments** field.

8. Tap **Done** and then tap **Submit**.

Result
The Time worked form is saved and the time card is added to the Time worked list.

Initiate a request to source parts for work order tasks using the Mobile Agent application

Initiate a request to source the missing parts of an enterprise asset associated with a work order task by using the Mobile Agent application.

Before you begin
Role required: sn_eam.enterprise_asset_manager or wm_agent

About this task
You can work on part requirements associated with a work order task in the Mobile Agent application but you can't create a part requirement.

You can only initiate the sourcing workflow using the Mobile Agent application. The sourcing flow can be completed only in the Enterprise Asset Workspace.

Procedure
1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task for which you want to create a source parts request is not displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the task for which you want to request to source missing parts.
6. Tap the **Parts** tab.
   The Part Requirements section shows a list with the first few part requirement records associated with the work order task.
7. If the part for which you want to create a source parts request isn't displayed, tap **See all**.
8. **Optional:** Update the required quantity of parts that you want to source.
   a. Tap the part requirement record.
   b. On the Part requirements form, enter the quantity in the **Required quantity** field.
   c. Tap **Submit**.
9. Tap **Source Parts Request**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- A catalog request is created for sourcing the parts.
- The status of the part requirements record changes from Not requested to Requested.
- In the Requested items list, an open work order parts request is created automatically.

What to do next

You must complete the sourcing of the requested parts in the Enterprise Asset Workspace. For more information, see Source parts for an Enterprise Asset Management work order or work order task.

Close a Pick Up Asset task using the Mobile Agent application

Complete and close the Pick Up Asset task for the enterprise asset that you have picked up from the designated stockroom for your assigned work order using the Mobile Agent application.

Before you begin

The status of the Pick Up Asset task must be Work in progress.

Role required: wm_agent or sn_eam.enterprise_asset_technician

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task you want to close isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon  and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon  , tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the work order task for which you want to close the associated Pick Up Asset task.
6. Tap the **Parts** tab.
   The Pick Up Asset Tasks section shows the first few Pick Up Asset tasks in the list of tasks associated with the work order task assigned to you.
7. If the task you want to complete isn't displayed, tap **See All**.
8. Tap the Pick Up Asset task that you want to complete and then tap **Close complete**.

Result

- The state of the Pick Up Asset task changes from Open to Closed Complete.
- A record is created in the Asset Usages section with the Status of Not Used and State of In stock.

> **Note:** For a consumable asset, the State changes to Consumed.

What to do next

Take necessary asset action on the enterprise asset associated with the work order. For details, see Take action on an enterprise asset using the Mobile Agent application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Take action on an enterprise asset using the Mobile Agent application

Deploy, remove, or swap any assets or parts that are required for an enterprise asset by using the Mobile Agent application. You can also use the application to calibrate your enterprise assets.

Before you begin

Role required: wm_agent

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task you want to work on isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon () and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon (), tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the work order task for which you want to take action.
6. Complete all the work that is required for the work order task.
   - If you want to deploy, swap, or remove any required assets or parts, use the following steps:

     a. Tap the **Parts** tab of the work order task.

     By default, the Asset Usages list displays only the first few assets and parts that are associated with the work order task. If the asset or part that you want to take action on isn't displayed, tap **See all**.

     b. On the Asset Usages list, choose the action that you want to take on the asset or part.

     Note: If you want to filter the displayed assets or parts, tap the Filter icon () and enter the values to use as a filter in the **Quantity**, **State**, **Substate**, or **Display name** fields.

Available actions

Action	Description
Deploy an asset or part	The asset or part must have a status of Not Used. You can also deploy assets or parts from your personal stockroom that have a state of In stock and a substate of either Available or Reserved. **i.** Select the asset. **ii.** Tap **Deploy**. **iii.** On the Deploy asset screen, tap the asset that you want to deploy. **iv.** On the Deploy asset execute screen, in the **Quantity** field, select the quantity of parts that you want to deploy. **v.** Add the asset or part as a child of another asset or part by tapping **Add to asset** and then selecting the required asset from the asset list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action	Description
	vi. Assign the asset or part to a specific user by tapping **Assign to user** and then selecting the user from the list of users. vii. Tap **Deploy**. **Result** ▪ The Asset Usages list reloads to display the deployed asset or part with a Status of **Used** and State of **In use**. The Status of a consumable asset changes to **Consumed**. ▪ If the work order task has an asset group and affected assets list, the deployed asset is added to the asset group and to the **Affected assets** section in the **Related** list. ▪ If the work order task has an affected assets list but no asset group selected, the deployed asset is added to the **Affected assets** list only.
Remove an asset or part	The asset or part must have a state of In use, In maintenance, or Consumed. i. Select the asset or part. ii. Tap **Remove**. iii. On the Remove asset screen, tap the asset or part that you want to remove. **Note:** The assets available in this field depend on whether the **Affected assets** list is populated. ▪ If the Affected assets list is populated, only assets in the list and their descendants with **Required** set to **false** are available. ▪ If the Affected assets list is empty — for example, when the work order and work order task are based on a location— assets associated with the work order task location and descendant locations are available. Descendant assets are included only if **Required** is set to **false**. iv. Tap **Remove**. **Result** ▪ The **Asset Usage** section reloads to display the removed asset or part, which now has the Status of**Removed** and State of **In stock**. ▪ If the work order task is based on an asset group, the removed asset is also removed from the asset group.
Swap an asset or part with a replacement part	i. Tap **Swap**. ii. On the Select asset to swap screen, tap the asset or part that you want to swap.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Action	Description
	Note: The assets available in this field depend on whether the Affected assets list is populated. ▪ If the Assets Affected list is populated, only assets in the list and their descendants with **Hot swappable** set to **true** are available. ▪ If the affected assets list is empty — for example, when the work order and work order task are based on a location— assets associated with the work order task location and descendant locations are available. Descendant assets are included only if **Hot swappable** is set to **true**. **iii.** On the Swap assets screen, in the **Swap in asset** field, select the replacement part that you want to swap in from the asset list. **Note:** The replacement part must have a State of In stock and a substate of Available. **Result** ▪ The Asset Usages list reloads and displays the updated asset statuses: ▪ The Swap out asset has a status of Removed. ▪ The Swap in asset has a status of Used. ▪ The replacement asset is automatically added to the **Affected assets** section in the **Related** list. ▪ If the work order task is based on an asset group, the swapped-out asset is removed from the asset group, and the replacement asset is added to the asset group.

- If you want to calibrate the associated enterprise asset, use the following steps:

a. Tap **View calibrations** on the work order task.

Note: The **View calibrations** button is only visible when the work order task is in the Work in progress state. If the work order task is associated with an asset group that has no calibration attributes defined for the assets, the **View calibrations** button is not visible.

The **Calibration events** screen opens with two tabs: **Open** and **Completed**.

- The **Open** tab displays all calibration events that are not yet completed.
- The **Completed** tab displays all completed calibration events.

b. Tap the calibration event that you want to complete.

The Calibration event playbook opens.

Note: Each lane in the playbook represents an activity that you must complete as part of the calibration event workflow.

c. Expand the Calibration event playbook.

d. Expand the **Details** lane and then tap **Calibration event details**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. On the Calibration event details screen, fill in the fields.

Calibration event details screen

Field	Description
Name	Name of the calibration event.
Environmental conditions	
Temperature	Temperature of the environment in which you are performing the calibration.
Temperature unit	Unit of temperature that you are using to measure the environmental temperature.
Humidity (%)	Relative humidity level of the environment in which you are performing the calibration.

f. Tap **Mark as complete**.

The Details lane is marked as Complete and you automatically progress to the Calibration Lines lane.

g. On the Calibration lines screen, select the calibration line that you want to complete or skip.

Each calibration line corresponds with a calibration attribute on the associated enterprise asset. If any calibration attribute contains multiple points at which you can measure accuracy, the Enterprise Asset Management application creates a separate calibration line for each point. You can choose to complete or skip each calibration line as needed. For more details on calibration attributes, see Add calibration attributes to an enterprise asset or Add calibration attributes to an enterprise model.

h. On the Calibration line record, use one of the following options to complete or skip the calibration line:

- To complete the calibration line, tap **Edit**. On the Edit calibration line screen, fill in the fields and then tap **Submit**.

Edit calibration line screen

Field	Description
Instrument	Instrument that you are using to perform the calibration. If you specified an instrument model in the **Instrument model** field of the corresponding calibration attribute, the options in this field are filtered based on the specified instrument model.
Expected value	Value that you are measuring tolerance conformance against. This field populates automatically based on the expected value that you specified in the calibration attribute. **Note:** This field appears only if you set the Value type of the calibration attribute to either Accuracy % full scale, Accuracy % point, or True/false.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
As found value	Value that you measure prior to the calibration.
As left value	Value that you measure after the calibration.
Comment	Additional comments about the calibration.

- To skip the calibration line, tap **Skip**.

i. Return to the Calibration lines screen.

j. Repeat steps f to h for each of your calibration lines.

> **Note:** If any of your calibration lines have a Result of Failed, you can remediate the entire calibration event by initiating a new work order and corresponding work order tasks. See Remediate an unsuccessful enterprise asset calibration for detailed instructions.

k. Tap **Mark as complete**.

The Calibration lines lane is marked as Complete.

l. Repeat steps b through k for each calibration event in the **Open** tab.

What to do next

Close the work order associated with the enterprise asset. For details, see Close a work order for an enterprise asset using the Mobile Agent application.

Close a work order for an enterprise asset using the Mobile Agent application

Close an assigned work order by marking all the required work for the associated asset as complete using the Mobile Agent application.

Before you begin

Role required: wm_agent

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task you want to close isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon ( ) and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon ( ), tap **Sort by**, and select the fields to sort your tasks.
5. Tap the work order task that you want to close.
6. On the **Details** tab of the work order task, tap **Close Complete** .
7. In the **Work notes** field, enter your closure comments.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. Tap **Done**.
9. Tap **Submit**.

Result
The state of the work order task changes from Work In Progress to Closed Complete.

Create a checklist for work order tasks using the Mobile Agent application

Manage your work order tasks by creating a checklist of all items that you must complete for a work order or work order task using the Mobile Agent application.

Before you begin
Role required: wm_agent

Procedure
1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task for which you want to create a checklist is not displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon  , enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon  , tap **Sort by**, and select the fields to sort your tasks.
5. Tap the work order task for which you want to create a checklist.
6. Tap the **Related** tab.
   The Checklist section of the Related tab shows the existing checklists for the work order task. The checklists marked as complete are displayed at the bottom of the list.
7. In the **Checklist** section, tap **Add item**.
8. On the **Add checklist** screen, in the **Name** field, enter the name of the checklist.
9. In the **Order** field, enter the order in which the checklist item should be completed.
   For example, a value of 1 indicates that the given checklist item is the first item you must complete.
10. Tap **Done** and then tap **Submit**.

Result
The checklist is displayed in the specified order in the Checklist section.

View knowledge articles related to work order tasks in the Mobile Agent application

View helpful and relevant knowledge articles attached to work order tasks in the Mobile Agent application.

Before you begin
Role required: wm_agent

Procedure
1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.

3. If the task you want is not displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon, enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields to sort your tasks.
5. Tap the work order task for which you want to view the knowledge articles.
6. Tap the **Related** tab.
7. View relevant knowledge articles.
   - To view a knowledge article related to the work order task, tap the article link in the **Attached Knowledge** section.
   - To view knowledge articles related to the parts associated with the work order task, tap the article link in the **Parts Knowledge** section.

   The selected article is displayed.

Note: You can provide feedback on a knowledge article by rating the article, marking the article as helpful or not helpful, or posting comments for the article.

Create work notes about the work order tasks using the Mobile Agent application

Add notes with details about work order task to the task record using the Mobile Agent application.

Before you begin

Role required: wm_agent

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens with the first few tasks in the list of tasks assigned to you displayed.
3. If the task to which you want to add a work note isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields to sort your tasks.
5. Tap the work order task for which you want to add a work note.
6. Tap the **Activity** tab.
   All the work notes related to the work order tasks are listed.
7. Tap **Compose**.
8. On the Compose screen, type your comments related to work order task.
9. Tap **Post**.

Result

The posted work note is shown in the **Activity** tab of the work order task record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Set enterprise assets to the shutdown state using the Mobile Agent application

Move assets of a shutdown work order task to the shutdown state in the Mobile Agent application to indicate that the assets are unavailable for use during maintenance.

Before you begin

The shutdown work order task must be in the Work in progress state before you can shut down assets. The assets must be in the In use or In maintenance state.

Role required: sn_eam.asset_technician

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens, displaying the first few tasks assigned to you.
3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon () and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon (), tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the work order task of the **Shutdown** work type that has the assets that you want to shut down.
6. On the **Details** tab, tap **Start Work**.
7. Tap the **Related** tab.
   The **Affected assets** section shows all the assets associated with the work order.
8. Tap **Shutdown**.
9. In the **Select assets to shutdown** screen, select the assets that you want to shut down.
10. Tap **Submit**.

Result

In the Affected assets list, the substate of the assets that are shut down changes to Is shutdown.

Start up enterprise assets after maintenance activities using the Mobile Agent application

Move assets of a startup work order task to the In use state in the Mobile Agent application to indicate that the assets are available for use after maintenance.

Before you begin

The startup work order task must be in the Work in progress state before you can start up assets.

Role required: sn_eam.asset_technician

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens, displaying the first few tasks assigned to you.
3. If the task you want to start isn't displayed, tap **See all**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon () and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon (), tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the work order task of the **Startup** work type that has the assets that you want to start up.
6. On the **Details** tab, tap **Start Work**.
7. Tap the **Related** tab.
   The **Affected assets** section shows all the assets associated with the work order.
8. Tap **Start up**.
9. In the **Select assets to start up** screen, select the assets that you want to start up.
10. Tap **Submit**.

Result
In the Affected assets list, the state of the assets that are started up changes to In use.

Move enterprise assets to maintenance state using the Mobile Agent application

Move assets of a break fix or planned maintenance work order task to the In maintenance state in the Mobile Agent application to indicate that the assets are under maintenance.

Before you begin
The break fix or planned maintenance work order task must be in the Work in progress state before you can move assets to the In maintenance state.

Only assets in the following states and substates can be moved to the In maintenance state:

- In use
- In use and Pending repair
- In use and In repair
- In use and Is shutdown

Role required: sn_eam.asset_technician

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens, displaying the first few tasks assigned to you.
3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon () and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon (), tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the work order task of the Break fix or Planned maintenance work type that has the assets that you want to move to the In maintenance state.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. On the **Details** tab, tap **Start Work**.
7. Tap the **Related** tab.
   The **Affected assets** section shows all the assets associated with the work order.
8. Tap **Move to maintenance**.
9. In the **Select assets to move to maintenance** screen, select the assets that you want to move to the **In maintenance** state.
10. Tap **Submit**.

Result
In the Affected assets list, the state of the assets changes to In maintenance.

Manage enterprise asset repair tasks using the Mobile Agent application

Manage all the repair tasks associated with the defective enterprise assets in your stockroom using the intuitive Mobile Agent application.

Start working on a enterprise asset repair task using the Mobile Agent application

Indicate in the Mobile Agent application when you start work on a repair task assigned to you.

Before you begin
Role required: sn_eam.enterprise_asset_technician

About this task
You can work on the repair tasks that belong to the following task types:

- Asset troubleshoot task
- Asset repair task
- Asset evaluate task

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon  and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon  , tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the repair task that you want to start.
6. On the **Details** tab, tap **Start work**.

Result
On the **Details** tab, the **Start work** link changes to **Start timer**, **Record time**, and **Close** automatically.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Record time worked on an enterprise asset repair task using the Mobile Agent application

Manage and record time worked on Troubleshoot asset, Repair asset, and Evaluate asset tasks using the Mobile Agent application. After you start working on a task, you can pause and resume work. You can also record the time worked manually.

Pause an enterprise asset repair task using the Mobile Agent application

Record a break from a repair task for the enterprise assets using the Mobile Agent application if you're not continuing to work on it. Resume the task when you start working on it again. The system automatically tracks and calculates the actual time taken to complete the task even though the work was interrupted.

Before you begin

After you start work on the repair task, make sure to start recording the time by tapping the **Start Timer** in the **Details** tab.

Role required: asset_technician

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to pause isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon  and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon  , tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the task record that you want to pause.
6. In the **Details** tab, tap **Pause**.
   On the **Details** tab, the **Pause** option changes to **Resume**.
7. Tap **Resume** when you're ready to work on the activity again.

Result

Each time you pause or resume work on the repair task, the actual time you worked on the task is automatically calculated. An entry for the time worked is created in the Time worked section of the Related tab.

Record time worked on an enterprise asset repair task manually using the Mobile Agent application

Record time worked on an enterprise asset repair task manually and provide any additional comments on the task using the Mobile Agent application.

Before you begin

Make sure you have indicated that you started working on the repair task by tapping **Start work** in the **Details** tab.

Role required: asset_technician

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task for which you want to record time isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the repair task record for which you want to record time.
6. On the **Details** tab, tap **Record time**.
7. On the Record time screen, specify the details of the task.
   a. Enter the time duration that you worked on the task in the **Time worked (Hours)** and **Time worked (Minutes)** fields.
   b. **Optional:** Provide any additional information in the **Time worked comments** field.
8. Tap **Done** and then tap **Submit**.

Result

The Record time form is saved and the time card is added to the Time worked section of the Related tab.

Close an enterprise asset repair task using the Mobile Agent application

Complete an assigned enterprise asset repair task and mark the task as closed using the Mobile Agent application.

Before you begin

Role required: sn_eam.enterprise_asset_technician

About this task

You can close any task that belongs to the following task types:

- Troubleshoot asset task
- Repair asset task
- Evaluate asset task

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to close isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- To filter your tasks, tap the Filter icon () and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
- To sort your tasks, tap the Filter icon (), tap **Sort by**, and select the fields to sort your tasks.

5. Tap the repair task that you want to close.
6. On the **Details** tab of the repair task, tap **Close** .
7. On the Repair task input form screen, enter the result of your task.

Task	Action
Troubleshoot asset	In the **Troubleshoot result** field, select any of the following: ○ **Repairable** ○ **Unrepairable** ○ **Redeployable**
Repair asset	In the **Repair result** field, select any of the fol lowing: ○ **Repaired** ○ **Unrepairable** ○ **Redeployable**
Evaluate asset	In the **Evaluation result** field, select any of the following: ○ **Redeployable** ○ **To be disposed**

8. In the **Work notes** field, enter your closure comments.
9. Tap **Done** and then tap **Submit**.

Result
The state of the repair task changes to Closed Complete.

Manage enterprise asset pick tasks using the Mobile Agent application

Work on the Asset pick tasks assigned to you by using the Mobile Agent application.

Start working on an enterprise asset pick task using the Mobile Agent application

Indicate in the Mobile Agent application when you start work on an asset pick task assigned to you.

Before you begin
Role required: inventory_user

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon  and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon  , tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the Asset pick task that you want to start.
   Use the details provided in the following fields on the **Details** tab to start work on the assigned asset pick task:
   - **Asset**: Asset that you should pick.
   - **Stockroom**: Stockroom from which you should pick the asset.
   - **Pick location**: Aisle and space within the stockroom from where you should pick the asset.
6. On the **Details** tab, tap **Start work**.

Result
On the **Details** tab, the **Start work** link changes to **Start timer**, **Locate**, and **Scan asset** automatically.

What to do next
Complete the asset pick task assigned to you. For details, see Locate and pick the enterprise assets in your stockroom using the Mobile Agent application.

Record time worked on an enterprise asset pick task using the Mobile Agent application

Manage and record time worked on enterprise asset pick tasks by using the Mobile Agent application. After you start working on a task, you can pause and resume work.

Pause an enterprise asset pick task using the Mobile Agent application

Record a break from an enterprise asset pick task by using the Mobile Agent application if you're not continuing to work on it.

Before you begin
After you start work on the enterprise asset pick task, start recording the time by tapping **Start timer** in the **Details** tab.

Role required: inventory_user

About this task
After you pause a task, you can resume when you start working on it again. The system automatically tracks and calculates the actual time taken to complete the task even though the work was interrupted.

Procedure
1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to pause isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
- To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.

5. Tap the asset pick task record that you want to pause.
6. In the **Details** tab, tap **Pause**.

   Note: The **Pause** option is displayed only after you tap **Start timer**.

   On the **Details** tab, the **Pause** option changes to **Resume**.
7. Tap **Resume** when you're ready to work on the activity again.

Result

Each time you pause or resume work on the asset pick task, the actual time you worked on the task is automatically calculated. An entry for the time worked is created in the Time worked section of the Related tab.

Locate and pick the enterprise assets in your stockroom using the Mobile Agent application

Locate an enterprise asset placed in a specific aisle and space in the stockroom by using indoor maps. After locating the asset, pick and drop off the asset to another location within the stockroom using the Mobile Agent application.

Before you begin

You should explicitly install Indoor Mapping for Assets (com.sn_ima) application from the ServiceNow Store. When you install this application, Indoor Mapping (sn_map_core) and Indoor Mapping component (sn_map_component) are also installed.

Role required: inventory_user

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying only the first few tasks in the list of tasks assigned to you.
3. If the task you want to start isn't displayed, tap **See all**.
4. **Optional:** Filter or sort the task view.
   - To filter your tasks, tap the Filter icon and enter the values to use as a filter in the **Due Date**, **Asset**, **Location**, or **Priority** fields.
   - To sort your tasks, tap the Filter icon, tap **Sort by**, and select the fields by which to sort your tasks.
5. Tap the Asset pick task for which you have started work.
6. To locate the enterprise asset in the stockroom, on the **Details** tab, tap **Locate**.
   - The exact location of the enterprise asset in the stockroom is displayed on the map.
   - The **Get directions** option is displayed.
7. Get directions to the asset location in the stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Tap **Get directions**.

b. Choose the start location on the map.

c. Tap **Save**.

- The following details are displayed on the map:
  - Path from the start location to the asset location
  - Approximate time required for you to reach the asset location
- **View steps** and **Scan asset** options are displayed.

8. **Optional:** To view the route to the asset location, tap **View steps**.
9. After reaching the asset location, pick the asset.
10. Complete the Asset pick task.

a. Tap **Scan asset**.

b. Provide the asset tag information.

- To provide the information through a scan, scan the asset tag of the asset.
- To provide the information manually, enter a value in the **Asset tag** field.

c. **Optional:** In the **Drop off location** field, select the space within the stockroom where you want to drop off the asset that you picked.

d. Select **Close complete**.

- The state of the Asset pick task changes to Closed complete.
- The **Location** field of the asset is updated with the drop off location only if you have specified the drop off location.
- The Enterprise Asset request flow and Enterprise Refresh Request flow proceed to the next stage.

Manage enterprise asset put away using the ServiceNow Agent application

Scan and put away the assets from the receiving bay in the designated aisle-space using the ServiceNow Agent application.

Put away enterprise assets using the ServiceNow Agent application

Scan available assets in the inventory and perform asset put away in the designated scanned drop-off location.

Before you begin

Role required: inventory_user

About this task

The inventory user can scan the available assets in the inventory and put them away in the scanned aisle-space in the stockroom. The Enterprise Asset Management application checks the existence of an active put away task for the asset and makes the required update in the Enterprise Asset Workspace.

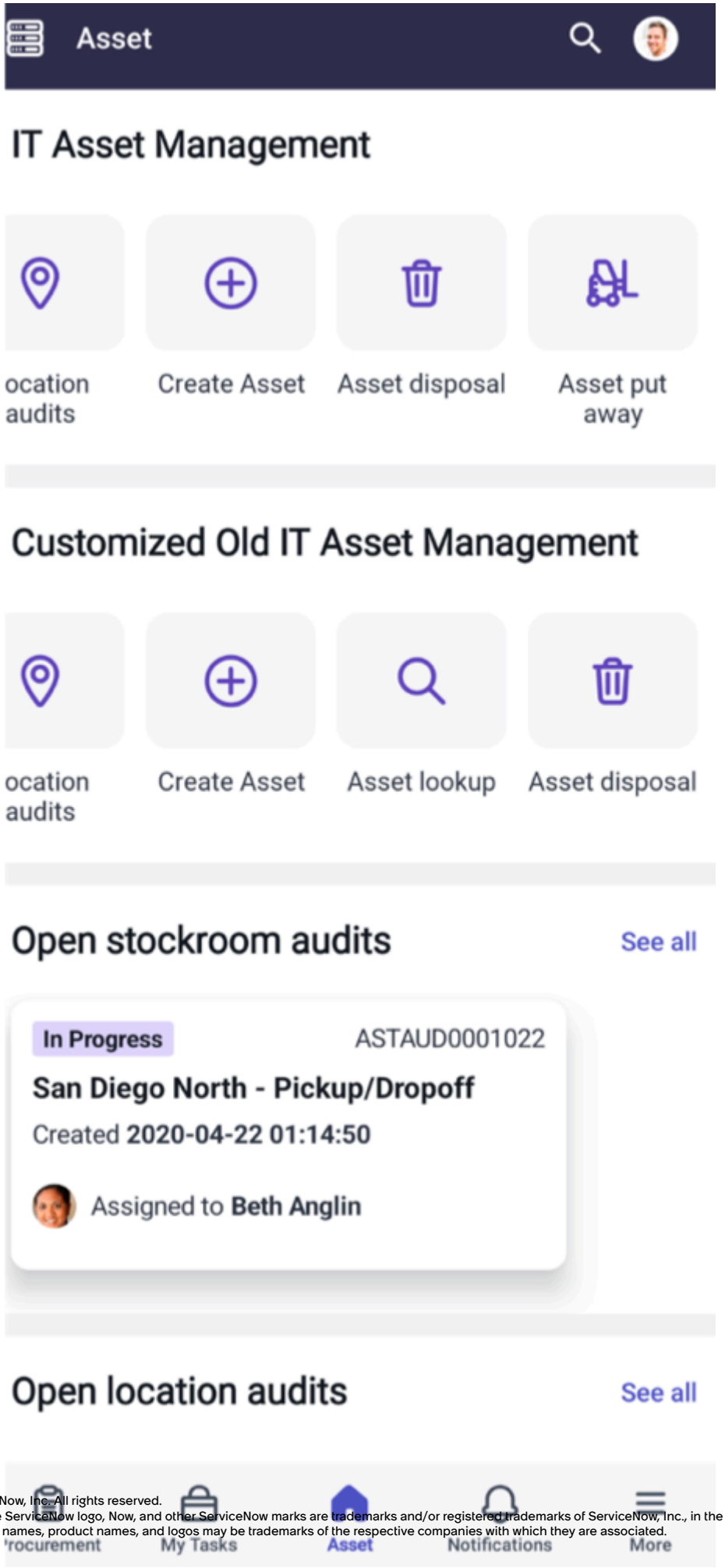
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If an active Asset put away task exists, the task is closed when the asset is placed in the designated stockroom location.
- If an active Asset put away task doesn't exist for the asset, then a task is created and closed when the asset is placed in the designated stockroom location.

Procedure

1. From your mobile device, launch the Now Mobile Agent application.
2. On the navigation bar, tap the **Asset put away** menu.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

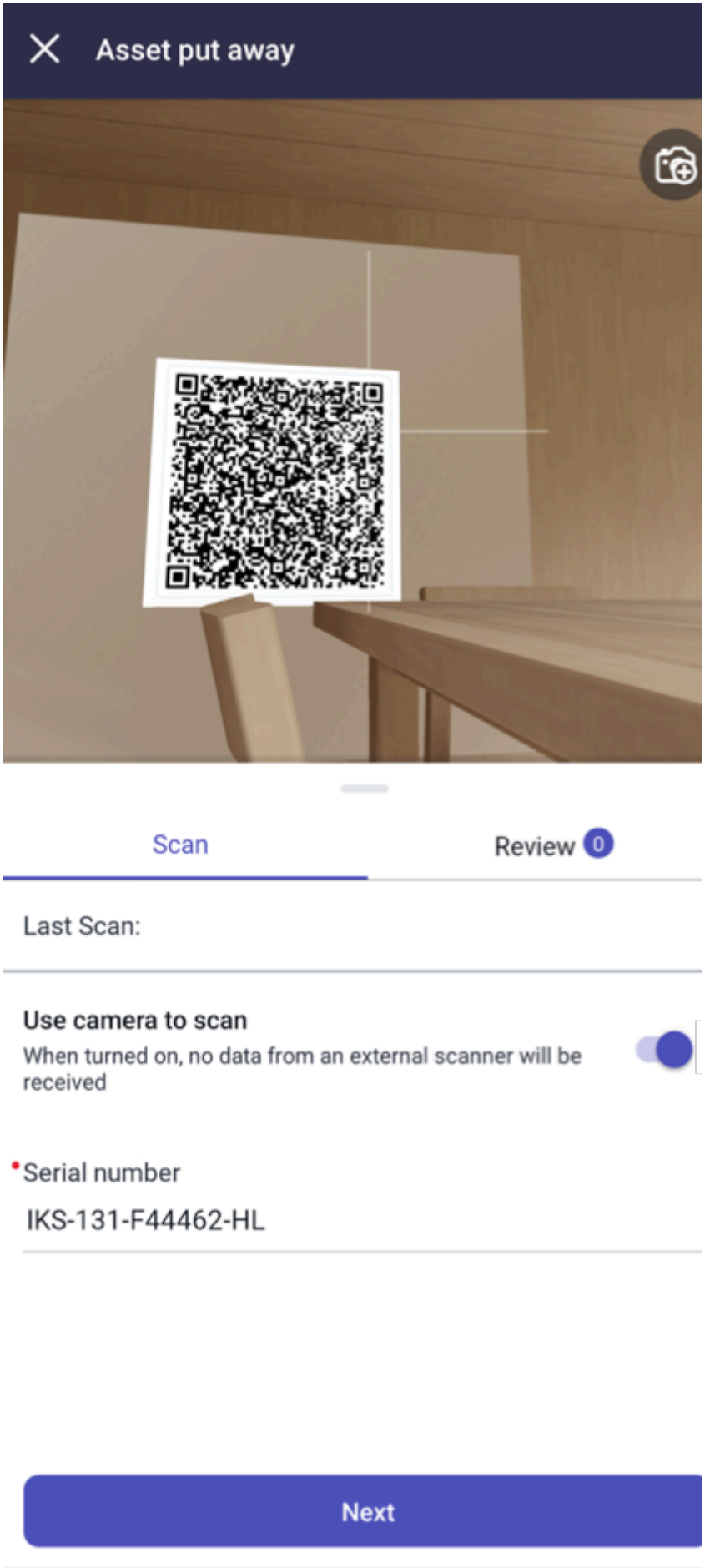


© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The Asset put away page is displayed.

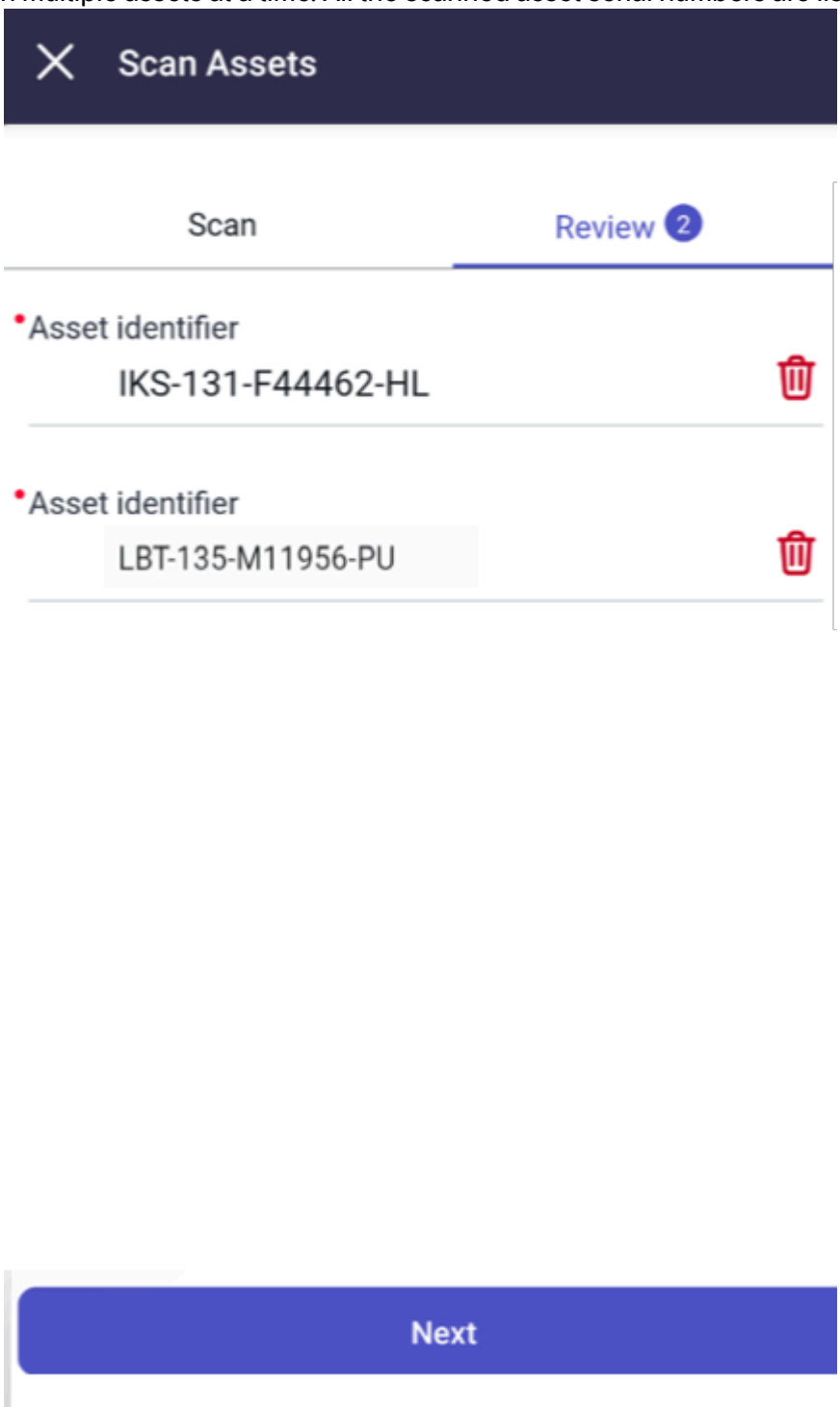
3. Enter or scan the asset serial number and tap **Next**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



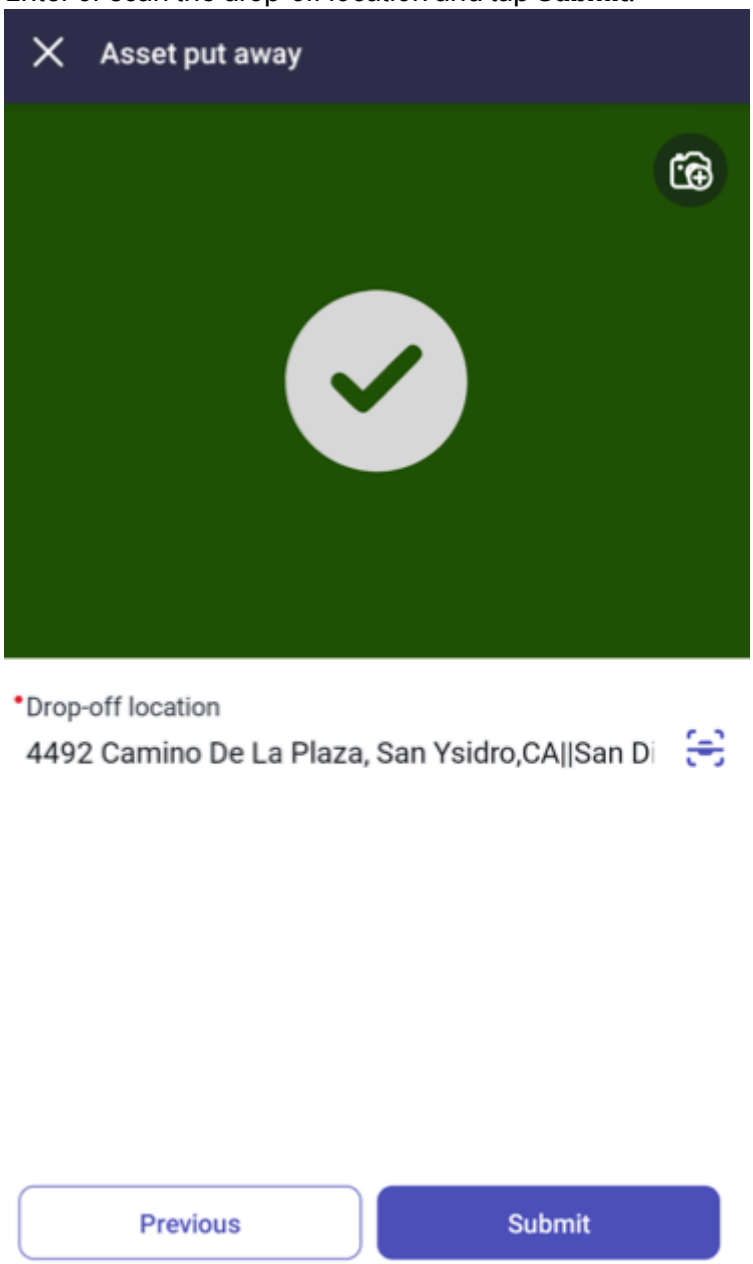
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can scan multiple assets at a time. All the scanned asset serial numbers are listed in the **Review** tab.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Enter or scan the drop-off location and tap **Submit**.



Result
A confirmation message appears on the mobile screen showing the number of put away tasks closed.

Manage Drop off tasks for enterprise assets using the Mobile Agent application

As an enterprise asset technician, manage the delivery of enterprise assets that you have in your personal stockroom to any other warehouse stockroom by creating Drop off tasks in the Mobile Agent application. The asset manager of the destination stockroom receives the assets that you dropped off, verifies the asset, and completes the Receive and Drop off tasks in the Mobile Agent application.

You can also manage Drop off tasks in the Enterprise Asset Workspace. For details, see Delivering enterprise assets in your personal stockroom through Drop off tasks.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a Drop off task for enterprise assets using the Mobile Agent application

Create a Drop off task using the Mobile Agent to return the enterprise assets in your personal stockroom to any other warehouse stockroom.

Before you begin

Role required: sn_eam.asset_technician

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens displaying the following sections:
   - **My group task**
   - **My Tasks** with the list of tasks assigned to you
3. In the My group task section, tap the **Create Drop Off Task** icon.
4. On the Get Drop-Off Task Details screen, fill in the schedule details to create the drop off task.
   a. In the **Delivery by date** field, select the date by when you want to deliver the assets to the destination stockroom.
   b. In the **Destination stockroom** field, select the stockroom at which you want to drop off the assets.
   c. Tap **Submit**.
   The drop off task is created in the Open state and listed under My Tasks.
5. From the My Tasks list, tap the drop off task to add the assets.
   You can only add enterprise assets that are in your personal stockroom and that aren't reserved and aren't part of any workflows.

UI option	Action
Add assets button	**a.** Tap **Add assets**. **b.** Provide the asset tag information. ▪ To provide the information through a scan, tap **Scan** and then scan the asset tag of the asset. ▪ To provide the information manually, en ter a value in the **Asset tag** field and tap the Enter key on the keyboard of your mo bile device. **c.** Tap **Submit**.
Assets tab	**a.** Tap the **Assets** tab. **b.** Provide the asset tag information.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

UI option	Action
	▪ To provide the information through a scan, tap **Scan** and then scan the asset tag of the asset. ▪ To provide the information manually, en ter a value in the **Asset tag** field and tap the Enter key on the keyboard of your mo bile device. **c.** Tap **Submit**.

- The asset that you added is listed under the Assets tab of the drop off task.
- The **Start Work** option appears for the drop off task.

6. After adding the required assets to the drop off task, tap **Start Work**.
   On the **Details** tab, the **Start work** link changes to **Start timer**, **Record time**, and **Drop off** automatically.
7. Drop off the assets at the required stockroom.
8. Tap **Drop off**.

Result

- A Receive task is created and assigned to the asset manager of the stockroom where you dropped off the assets.
- The state of the Drop off task changes to Work in Progress.

Verify the enterprise assets received through a Drop off task using the Mobile Agent application

As an asset manager, confirm that you received the enterprise assets that were delivered to your stockroom and complete the Receive task using the Mobile Agent application.

Before you begin

Role required: sn_eam.enterprise_asset_manager

Procedure

1. From your mobile device, launch the Mobile Agent application.
2. On the navigation bar at the bottom of the screen, tap the **My Tasks** tab.
   The home screen of the My Tasks application opens, showing you a list of your assigned tasks.
3. Tap the Receive drop off task that you want to verify and complete.
   The Details tab shows the following fields:
   - **Expected**: The number of assets that are expected to be received.
   - **Received**: The number of assets that have been scanned and received.
   - **Not received**: The number of assets that couldn't be received.

   > **Note:** Before you start working on the task, the **Expected** and **Not received** fields will show the same number of assets.

4. Tap **Start work**.
   On the **Details** tab, the **Start work** link changes to **Start timer**, **Scan**, and **Close Task** automatically.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Scan the enterprise assets that you physically received at your stockroom.

   a. Tap **Scan**.

   b. Provide the asset tag information.
   Follow any of these steps for each enterprise asset that you received at your stockroom:
   - Scan the asset tag of the enterprise asset that you received using the camera on your mobile device.
   - Enter a value in the **Asset tag** field and tap the Enter key on the keyboard of your mobile device.

   The enterprise assets are automatically added to the **Review** tab.

6. Acknowledge the receipt of the enterprise assets that you scanned.

   a. Tap **Receive**.
   The Receive screen opens and the **Asset tag** field displays the count of assets that you scanned.

   b. Tap **Submit**.

   The **Received** field in the Details tab shows the count of assets that you received.

   When you receive all the enterprise assets, the value in the **Expected** field matches the value in the **Received** field.

7. After receiving all the enterprise assets, tap **Close Task**.

Result
The state of the Receive drop off task and the associated Drop off task changes to **Closed Complete**.

Procuring enterprise assets

You can use the ServiceNow® Procurement application to source and receive requested enterprise assets so that you can fulfill service catalog requests.

Overview of procuring enterprise assets

With the Procurement application, you can

- track and manage service catalog requests,
- create and manage purchase orders,
- create and manage transfer orders,
- and receive assets.

See Procurement for more information on procuring assets.

Source requests from Enterprise Asset workspace

You can create a request in the Service Catalog application and source that request from the Enterprise Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

You can source a request by using assets from the requester's local stockroom, if stock is available in the local stockroom. If stock is unavailable in the local stockroom, you can get the assets transferred from other stockrooms or create a purchase order.

Role required: proc_user

Procedure

1. Navigate to **Enterprise Asset Workspace** > **Procurement** > **Catalog tasks**.
2. Open the sourcing task for the request and select **Source request**.
3. On the Sourcing page, select either of these three options:
   - **Consume**: If the stock is available in your local stockroom.

     If the Asset pick task is enabled for the source stockroom, the task is added to the Enterprise Asset Refresh Request and Enterprise Asset Request flows.
   - **Transfer**: If the stock isn't available in your local stockroom and you want to source the request via a transfer order.

     Note: If you create a transfer order and want the local stockroom to be included in the list of stockrooms to choose from, the admin must turn on the `glide.asset.procurement.sourcing.local_stock_transfer` property.
   - **Purchase**: If the stock isn't available in your local stockroom and you want to source a request via a purchase order.
4. Fill in the required fields based on the option that you choose.
5. Select **Submit**.
   A task for transfer order line or purchase order line is created if you selected **Transfer** or **Purchase**. You can open the request to view the task.

Enterprise Asset Management reference

Reference topics provide additional information about the lists and forms that you use to configure and administer Enterprise Asset Management.

Domain separation and Enterprise Asset Management

Domain separation is supported in Enterprise Asset Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Standard

- Includes all aspects of **Basic** level support.
- Application properties are domain-aware as needed.
- Business logic: The service provider (SP) creates or modifies processes per customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must configure the minimum viable product (MVP) business logic and data parameters per tenant as expected for the specific application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sample use case: An admin must be able to make comments required when a record closes for one tenant, but not for another.

For more information on support levels, see Application support for domain separation.

Overview

Domain separation support in the product enables service providers to offer managed services for enterprise asset management to their customers. This feature also caters to large organizations who manage their subsidiaries as independent domains.

How domain separation works in Enterprise Asset Management

In Enterprise Asset Management, domain separation occurs in two stages: data separation and process separation. There are two system properties that are used to enable or disable the separation. In the Tokyo release, both data and process are domain-separated.

Note:

The Recommended practice is to avoid customizing the base system domain configuration record.

Required plugins

- Domain separation extension (com.glide.domain.msp_extensions.installer)
- Performance Analytics – Domain Support (com.snc.pa.domain_support)
- Work management (com.snc.work_management)

Other supported plugins

- Service Catalog – Domain Separation (com.glideapp.servicecatalog.domain_separation)
- Procurement (com.snc.procurement)

To learn more, see Domain separation explained, Contains queries and domain access, and Importance of Default domain.

Related topics

Domain separation for service providers

Components installed with Enterprise Asset Management

Several types of components are installed with activation of the com.sn_eam plugin, including user roles, plugins, and applications.

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

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles installed

Role title [name]	Description	Contains roles
Enterprise asset manager [sn_eam.enterprise_asset_manager]	This role has access to all Enterprise Asset Management features except administrative functions.	• wm_initiator • sn_eam.enterprise_mobile_user • sn_eam.enterprise_asset_creator • sn_eam.enterprise_asset_technicia • sn_eam.asset_manager • inventory_user • contract_manager • procurement_user • cmdb_query_builder • cmdb_read • plan_maint_admin • wm_task_initiator
Enterprise admin [sn_eam.enterprise_admin]	This role has full access to the Enterprise Asset Management application.	• inventory_admin • catalog_manager • category_manager • report_user • sn_eam.enterprise_asset_manager • asset • procurement_admin • sn_ent.classification_manager • cmdb_ot_isa_admin • sn_itam_common.asset_audit_adm • sn_eam.asset_import_users
Enterprise technician [enterprise_asset_technician]	This role is for users who perform work tasks and update asset records as part of the asset life cycle. This role has access to the following enterprise asset tasks: • All RMA tasks except the Prepare task • All recall tasks • All disposal tasks • All loaner tasks except the Prepare task	• sn_eam.enterprise_mobile_user • sn_eam.enterprise_asset_editor • sn_ent.classification_reader • canvas_user • sn_eam.asset_technician

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role title [name]	Description	Contains roles
	• Enterprise asset audits • Lease-end Collection, Preparation, and Shipment tasks	
Enterprise mobile user [sn_eam.enterprise_mobile_user]	This role has access to scan and dispose of assets from a mobile application.	none
Agent [wm_agent]	This role is for users who perform work on enterprise assets and record details in the corresponding work orders and work order tasks. **Note:** The wm_agent role must contain an additional role such as enterprise_asset_manager or enterprise_asset_technician, to access the Enterprise Asset Management application.	none
Asset import users [sn_eam.asset_import_users]	This role is for users who perform both AI-assisted and manual bulk imports.	• sn_ent_datamap.datamap_user • sn_ent_aia.ent_aia_user • lens_user
Datamap user [sn_ent_datamap.datamap_user]	This role has create, read, update, and delete (CRUD) access to enterprise data transform tables.	none
AI agents user [sn_ent_aia.ent_aia_user]	This role has access to AI skills related to model categories and classifications.	none
Lens user [lens_user]	This role has access to the ServiceNow AI Lens skill.	sn_nowassist_admin.user

Granular roles installed

EAM functionality	Granular admin role	Description
Shipment	asset_integration_admin	Provides write access to the Ignore stale check [ignore_stale_check] column in the Shipment [sn_itam_common_shipment] table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

EAM functionality	Granular admin role	Description
Carrier integration	asset_integration_admin	Provides access to the Carrier Integration Profile [sn_itam_carrier_int_profile] table to perform the following tasks: • Create carrier integration profiles • View reports
Contract renewal	contract_system_admin	Provides Write access to the *sn_itam_common.sn_contract_enable_renewal_flow* system property.
ITAM AI agents	asset_aia_admin	Provides access to read, write, delete, and report on the ITAM AI Agents Log [itam_aia_log] table.
Common Hardware Asset Management and Enterprise Asset Management tables	sn_eam.enterprise_admin	Provides access to the following tables: • RFID Connection Attributes [sn_itam_common_rfid_conn_attr] • RFID Stage Asset [sn_itam_common_rfid_stg_asset] • Repair order [sn_itam_common_repair_order] • Repair order line [sn_itam_common_repair_orderline] • Asset order [sn_itam_common_asset_order] • Asset order line [sn_itam_common_asset_orderline] • Loaner Asset Order [sn_itam_common_loaner_asset_order]

Plugins installed

Name	Description
Asset Management (com.snc.asset_management)	Provides functionalities to integrate the physical, technological, contractual, and financial aspects of information technology assets. For more information on Asset Management, see Asset Management.
Procurement (com.snc.procurement)	Provides the capability to source and receive requested assets so that you can fulfill service catalog requests. For more information on procurement, see Procuring enterprise assets.
Field Service Management (com.snc.work_management)	Provides the capability to manage work orders and related tasks. For more information on Field Service Management, see Field Service Management.
Enterprise Asset Management Core (com.sn_eam_core)	Provides core functionalities, such as normalization, for the Enterprise Asset Management application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name	Description
Asset Management Workspace - Recommendations plugin (com.sn_itam_recomm)	Provides actionable recommendations for users in configurable workspaces.
SM Planned Maintenance (com.snc.planned_maintenance)	Provides the capability to manage regular preventative maintenance of assets. For more information on Planned Maintenance, see Planned Maintenance.
Work Management (com.snc.work_management)	Provides the capability to manage your work orders, work order tasks, maintenance plans, and other relevant work order information.
Performance Analytics (com.snc.pa)	Provides dashboards containing actionable data visualizations that help you improve your business processes and practices.
Playbook Experience Core (com.glide.playbook_experience.config)	Provides a step-by-step guidance for setting up your assets with important information.
Process Automation Designer for App Engine (com.glide.pad.license)	Provides a simplified and task-oriented view of processes.
Cost Management (com.snc.cost_management)	Provides options to plan and control business costs.
Mobile Scripted Screen (com.glide.sg.scriptedscreen)	Provides scripted screens for smart assessments on mobile devices.

Applications installed

Name	Description
Expanded Model and Asset Classes (com.sn_ent)	Adds enterprise model and asset classes that extend out-of-the-box product model and asset classes within the CMDB class hierarchy. In addition, creates model categories that associate these enterprise model and asset classes with CMDB configuration item (CI) classes. For more information on the Expanded Model and Asset Classes application, see Expanded Model and Asset Classes.
CMDB CI Class Models (com.sn_cmdb_ci_class)	Adds class models that extend the CMDB class hierarchy, including class descriptions, identification rules, identifier entries, and dependent relationships.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name	Description
	For more information on the CMDB CI Class Models application, see CMDB CI Class Models store app.
Asset Management Common (com.sn_itam_common)	Provides features that are common to the Hardware Asset Management, Software Asset Management, and Enterprise Asset Management applications, including the catalog item to request asset reclamation.
Physical Assets (com.sn_phy_assets)	Marker that aligns features for physical asset-based applications, including the Hardware Asset Management and Enterprise Asset Management applications.
GRC: Risk Heatmap (com.sn_risk_heatmap)	Provides a heatmap component that enables you to visualize the risk posture of your organization. For more information on risk heatmaps, see Risk heatmap for classic risk assessment or Operational risk heatmap for Advanced Risk Assessment in the Risk Workspace.
Geo Map Component (com.sn_geo_map)	Provides the capability to track asset locations using indoor maps.
Smart Assessment Core (com.sn_smart_asmt)	Foundational application that is required for the smart assessment engine to work. This is required for the Assessment designer, Assessment component and Migration tools.
sn-smart-assessment-connected (com.sn_smart_assessment_connected)	Respond to assessments quickly using the Assessment response component. Its user-friendly and simple design enables users to submit assessments with more efficiency.
sn-smart-assessment-designer (com.sn_smart_assessment_designer)	Create assessment templates and add instructions, questions, and reference information to an assessment template.
Basic Scoring for Smart Assessments (com.sn_smart_scoring)	Scoring in Smart Assessment Engine is a systematic way to evaluate responses to various questions within an assessment. By attributing scores to answers, you can translate qualitative responses into quantitative data, offering each evaluation's measurable and comparable outcome.
Smart Assessment for Mobile (com.snc.smart_assessment_mobile)	Enables the smart assessment engine to work on mobile devices.
ISA Equipment Model (com.sn_isa_model)	Data model for ISA-95 equipment model entities and templates.
Enterprise Data Transform	Provides access to all enterprise data transform tables.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name	Description
(sn_ent_datamap)	
Enterprise Data Transform Components (sn_ent_datamap_components)	Provides access to seismic workspace components.
AI Agents for Enterprise (sn_ent_aia)	Provides AI skills related to model categories and classifications.
ServiceNow AI Lens (sn_ai_lens)	Uses generative AI to scan, extract, comprehend, and synthesize data so that you can optimize your workflows.

OT Asset Workspace roles

The following roles help you to manage the OT Asset Management application.

Access to the OT Asset Workspace depends on the role assigned to you.

- OT asset manager [sn_otam.ot_asset_manager]: Provides full access to the OT Asset Workspace.
- OT asset technician [sn_otam.ot_asset_technician]: Provides limited access to the OT Asset Workspace.

Asset fields for enterprise assets

A detailed description of all asset fields in the Enterprise Asset Management application.

Asset Details

Field	Description
Display name	Name of the asset as it appears in record lists. Automatically set when asset is created, based on **Asset Tag** and **Model** fields.
Model	Specific product model of the asset. **Note:** If you are creating a consumable asset, you can select any product model that meets the following criteria: • The Model type is set to Consumable. • The product model falls under the Enterprise good model [sn_ent_model] class or any of its child classes.
Model category	Model grouping of the asset. Based on the model category selected, the asset can be linked to a configuration item.
Parent	Parent asset of the asset. When a parent link is defined, the fields related to assignment and state of the child assets is set to read-

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Details (continued)

Field	Description
	only and are populated based on the parent assignment and state fields.
Asset type	Type of multi-component asset. The following are the types of multi-component assets: • Pre-assembled • User-assembled • Simple • Simple with add-on • Pre-assembled with add-on • User-assembled with add-on
Asset tag	Alphanumeric information assigned by your organization to help track the asset.
Configuration item	CI automatically created when this asset is created. The name that appears in this field is based on **Serial number** and **Model**. Point to the reference icon to see the configuration item details inherited from the asset record.
Serial number	Serial number of this asset.
State	The current state of the asset. By default, the newly created asset is in **Build** state. Once you configure the asset and its components, you can change the status of the model. The other state options are: • **On order** • **In stock** • **In transit** • **In use** • **In maintenance** • **Retired** • **Missing**
Substate	Current substate of the asset, such as **Available** or **Reserved**. The values in the Substate list change based what you select from the **State** list.
Asset function	Function as which the asset is used such as Primary, Secondary, Shared, or Loaner.
Stockroom	Stockroom that the asset is located in.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Details (continued)

Field	Description
Note: This field appears only if you set the **State** field to **In stock**.	
Aisle and space	Aisle and space details of the asset within the stockroom. This field appears only when the state of the asset is **In stock** or **Build**.
Reserved for **Note:** This field appears only if you set the **State** field to **In stock** or **In transit**.	User who the asset is reserved for.
Quantity	Number of items this asset represents. An asset always has a quantity of one unless one or more of these points are true. • It is a consumable. Quantity is unrestricted because consumables are tracked in groups. • It is pre-allocated. Quantity is unrestricted when **Model category** and **Model** are defined and **Substate** is set to **Pre-allocated**.
Eligible for refresh	Indicates whether or not the asset is eligible for a refresh. If the date in the **Installed** field is in the past, this check box is shown. This check box is selected automatically two months before the number specified in the model's **Useful life (months)** field. When the `EAM- Calculate Asset Refresh Eligibility` weekly scheduled job runs, it calculates all of the assets that are eligible for refresh.
Location	Current physical location of the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Details (continued)

Field	Description
	Note: If you set the location to a specific building, floor, or place, the Enterprise Asset Management application automatically populates a corresponding location hierarchy of up to three levels, including the campus, building or structure, and floor that the asset is currently located in. The location hierarchy depicts the hierarchical relationship between the specified location and the corresponding parent locations. You can view the location hierarchy in the Location Hierarchy section of the asset record, which is generated after you fill in all fields and save the form.
Assigned to	Person using or primarily responsible for this item. This field is visible when the asset state is **In Use**.
Assigned	Date on which the asset was assigned to a user.
Managed by	Person who maintains the asset. This can be different from the person in the **Owned by** field.
Installed	Date on which the asset was assigned to the person mentioned in the **Assigned to** field.
Owned by	Person who has financial ownership of the asset. This can be different from the person in the **Managed by** field.
Warranty expiration	The date the warranty expires.
Company	Company or organization to which this asset belongs.
Department	Department to which the asset belongs.
RFID tag	Real-time radio-frequency identification (RFID) tag that is associated with the asset. See Zebra MotionWorks RFID integration for Enterprise Asset Management for more information on RFID tags. **Note:** If this asset is a child of another asset and does not contain its own RFID tag, the **RFID tag** field populates with the RFID tag of the parent asset. If you remove the parent asset, the **RFID tag** field is cleared for this asset.
MAC address	MAC address of the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Details (continued)

Field	Description
	Important: From the Yokohama release onward, the value in this field is populated based on the **MAC address** [mac_addr] field in the Asset [alm_asset] table. The **MAC address** [mac_address] field in the Hardware [alm_hardware] table is deprecated. This field isn't shown on the asset form for consumables and pallets.
Support group	Group responsible for maintaining and managing the asset. The support group can belong to any of the following group types: • Asset managers • Asset techs
Supported by	Specific individual from the support group who is assigned to support the asset.
Comments	Message to add if any.

Financial form

Field	Description
Vendor	Vendor from which the asset was purchased. For assets automatically created from purchase orders in Procurement, the default value of the **Vendor** field is the vendor specified on the purchase order.
Opened	Date on which the requested item record was opened. The system automatically populates the field when a request line is specified.
Invoice number	Number of the invoice.
GL account	General ledger account number with which the asset is associated.
Request line	Requested item to which the asset is linked.
Cost	Price at which the asset was purchased.
Cost center	Cost center under which the asset was billed.
Acquisition method	How the asset was acquired. Base system choices are **Purchase**, **Lease**, **Rental**, **Loan**, and **RMA Replacement**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Financial form (continued)

Field	Description
	For assets automatically created from purchase orders in Procurement, the default value is **Purchase**
PO number	Purchase Order under which the asset was billed.

Depreciation form

Field	Description
Depreciation	Depreciation method that is applied. Base system choices are **Declining Balance** and **Straight Line**. The depreciation value is defaulted from the associated Model.
Residual date	Number of days that have passed since the **Depreciation effective date**.
Depreciation effective date	Date on which the specified depreciation method begins.
Residual value	Value in the Cost field with the depreciation method applied.
Salvage value	Estimated value of an asset at the end of its useful life. This value must be less than or equal to the Cost of the asset.
Depreciated amount	Amount the asset has depreciated.

Lease Contract

Field	Description
Lease contract	Name of the lease contract that applies to the asset.
Lease expiration date	Date on which the lease contract expires
Lease term (months)	Length of the lease contract, in months.
Monthly lease payment	Amount that you must pay monthly for the lease contract. **Note:** You can set this field to any currency of your choice.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Disposal form

Field	Description
Disposal order number	A unique number assigned to the asset disposal order.
Disposal vendor	The vendor assigned to carry out the asset disposal order.
Scheduled retirement	Scheduled date on which the asset is retired.
Retired date	Actual date on which the asset was retired.
Vendor disposal order ID	Order number assigned by the vendor assigned to carry out the asset disposal order.
Resale price	Value of the asset when it is retired. For example, if the asset is donated, the value used when reporting taxes.
Disposal date	The date when the asset disposal order process is completed.
Beneficiary	Organization that receives the asset when it is retired.

Asset Audit

Field	Description
Audit number	Audit number of the asset.
Audit type	Type of audit that was carried out on the asset.
Last audit date	Date on which the last audit was done.
Last audit state	State of the last audit.
Audited by	Person who performed the last audit.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

RFID

Note: If this asset is a child of another asset, the RFID location data that is mapped to and populated in these RFID form section fields is based on the RFID tag to which the asset is associated.

- **If this asset contains its own RFID tag, all RFID location data is based on that RFID tag.**
- **If this asset does not contain its own RFID tag, all RFID location data is based on the RFID tag of the parent asset. If you remove the parent asset, all RFID location data is cleared from the RFID form section fields for this asset.**

Field	Description
RFID tag	Real-time radio-frequency identification (RFID) tag that is associated with the asset. For more information on RFID tags, see Zebra MotionWorks RFID integration for Enterprise Asset Management.
Type	Type of RFID tag that is associated with the asset.
Tag source	Source of the asset's RFID location data that is stored and transferred through the RFID tag.
Serial number	Serial number of the asset.
Last blink time	Time at which the RFID tag was last scanned.
Last blink elapsed time	Amount of time that has passed since the RFID tag was last scanned.
Latitude	Latitudinal value of the asset.
Longitude	Longitudinal value of the asset.
Active	Option that indicates if the RFID tag is active. RFID location data can be mapped to the asset only if you select this option.
Site name	Name of the site that the asset is located in.
Zone group	Interrogation zone group that the asset belongs to.
Zone group dwell	Amount of time for which the asset belongs to the specified interrogation zone group.
Zone	Interrogation zone that the asset is located in.
Zone dwell	Amount of time for which the asset is located in the specified interrogation zone.
Grid-x	X coordinate of the asset within the designated RFID grid. The RFID system uses the XYZ coordinates to pinpoint the location of the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

RFID

Note: If this asset is a child of another asset, the RFID location data that is mapped to and populated in these RFID form section fields is based on the RFID tag to which the asset is associated.

- **If this asset contains its own RFID tag, all RFID location data is based on that RFID tag.**
- **If this asset does not contain its own RFID tag, all RFID location data is based on the RFID tag of the parent asset. If you remove the parent asset, all RFID location data is cleared from the RFID form section fields for this asset.**

(continued)

Field	Description
Grid-y	Y coordinate of the asset within the designated RFID grid. The RFID system uses the XYZ coordinates to pinpoint the location of the asset.
Grid-z	Z coordinate of the asset within the designated RFID grid. The RFID system uses the XYZ coordinates to pinpoint the location of the asset.
Status	Status of mapping RFID location data to the asset. If the data is successfully mapped to the asset, this field is set to **Matched**. If the data is not mapped to the asset, this field is set to **Unmatched**. **Important:** RFID location data can be mapped to the asset only if you select the **Active** option in the RFID form section. **Tip:** You can view and take action on the asset records that have an RFID **Status** of **Unmatched** by using the **Unmatched RFID tags** important action that appears on the **Overview** tab of the Enterprise asset estate view. For more information on the Enterprise asset estate view, see Enterprise asset estate overview for Enterprise Asset Workspace.

Activities

Field	Description
Work notes	Work notes are updated for the following cases: • Updates to **Assigned To**, **Managed To State**, **Substate**, and **Reserved** fields of asset. The columns for these fields are audited by default and any update is recorded in the work notes. • Work notes are updated when asset is received by a purchase order and transfer order. These work notes help in tracking life cycle of the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Device as a Service

Field	Description
DaaS asset	Option that indicates if the given asset is a Device as a Service (DaaS) asset.
DaaS account	DaaS account that the asset is leased to.

Asset audit fields for enterprise assets

Create New Asset Audits form and related fields description.

Create New Asset Audits form

Create New Enterprise Asset Audit

Field	Description
Audit number	Audit reference number.
Assignment group	Group to which you want to assign the audit.
Assigned to	Person responsible for the audit.
Type	Type of the audit. The available values are • Location • Stockroom
Status	Current status of the audit.
Location **Note:** This field appears only if you set the **Type** field to **Location**.	Location in which you want to perform the audit.
Include child locations **Note:** This field appears only if you set the **Type** field to **Location**.	Option to include child locations in the audit.
Stockroom **Note:** This field appears only if you set the **Type** field to **Stockroom**.	Stockroom in which you want to perform the audit.
Model category	Model category that you want to audit.
Aisle and space **Note:** This field appears only if you set the **Type** field to **Stockroom**.	Aisle and space within the stockroom where you want to perform the audit.
Scheduled date	Date on which you want to perform the audit.
Scan date	Date on which you want to scan the assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Enterprise Asset Audit (continued)

Field	Description
Include consumables	Option to include consumable assets in the stockroom audit. The available options are: • Yes: When this field is set to **Yes**, consumable assets are included in the inventory audit. • No: When this field is set to **No**, consumable assets aren't included in the inventory audit. **Note:** You can include consumable assets only for stockroom audit. When the **Type** field is set to **Stockroom**, this field is activated. When the **Type** field is set to **Location**, this field is automatically set to **No** and inactive. The default populated value for this field is derived using the *sn_itam_common.set_default_include_consumab* system property. • When this system property value is set to **yes**, the default value for the **Include consumables** field is set to **Yes**. • When this system property value is set to **no**, the default value for the **Include consumables** field is set to **No**.
Scan method	Type of scan method for scanning the assets. The available options are: • Single scan • Multi scan Depending on the value of the **Include consumables** field, the default selection for the scan method is automatically determined. • When the **Include consumables** field is set to **Yes**, the **Scan method** field value is automatically set to **Single Scan** and can't be edited. • When the **Include consumables** field is set to **No**, the Scan method field becomes editable, enabling you to select the desired scan type. Depending on the selected scan method for the audit record, you can scan the assets in the inventory using the ServiceNow Agent app.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create New Enterprise Asset Audit (continued)

Field	Description
	• To complete asset scanning for the single scan audit record, see Complete a single scan enterprise asset inventory audit using the ServiceNow Agent app. • To complete asset scanning for multi scan audit records, see Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app.

Note: The audit result fields such as **Expected**, **Not expected and location corrected**, **Missing**, **New**, and **Excluded from licensing** can't be edited. When the asset is scanned in the inventory using the ServiceNow Agent app, values are automatically updated in these fields. For more information about scanning assets, see Complete a single scan enterprise asset inventory audit using the ServiceNow Agent app and Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app.

Related topics

Audit results

Complete a single scan enterprise asset inventory audit using the ServiceNow Agent app

Complete multi scan enterprise asset inventory audit using the ServiceNow Agent app

Audit results

The Audit results shows the status of the assets when the scheduled or blind audits of asset stockrooms and other locations is complete.

The audit results are generated by comparing the assets scanned at the physical location or stockroom and the asset records present in the ServiceNow instance.

Asset audit result

Description	Description
Expected	Number of expected assets that were scanned.
Not expected and location corrected	Number of assets that were scanned but weren't expected.
Missing	Number of expected assets that weren't scanned.
New	Number of assets that were scanned but don't have a record in your ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset audit result (continued)

Description	Description
	Note: If the audit record's **Scan method** is set to **Multi scan**, a new asset record is created using the provided Asset tag. The new asset record is created with unknown product model and unknown model category value. Additionally, an asset remediation task is also created to notify you that an asset record is created with unknown model category and unknown product model. Open the asset remediation task from the Hardware Asset Workspace and update the **Model category** and **Model** fields value for the asset. For more information, see Close an enterprise asset remediation task.
Excluded from licensing	Number of scanned assets that are excluded from licensing. When you scanned a hardware asset that is considered as an excluded from licensing asset, if your ServiceNow® instance doesn't have an Hardware Asset Management license.
Found but not in audit scope	The number of scanned assets that are not within the scope of the current audit record. For example, if the audit is created to scan assets located in Aisle and Space 001 of the stockroom, but an asset belonging to Aisle and Space 002 in the stockroom is scanned, that asset cannot be categorized as an unexpected asset for the stockroom. Since the asset is still an expected asset for the stockroom, it is categorized as found but not in audit scope asset.

Related topics

Asset audit fields for enterprise assets

Enterprise model categories and corresponding classes

Enterprise model categories and their corresponding Configuration Management Database (CMDB) configuration item (CI), asset, and model classes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Medical model categories

Medical model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Medical General	N/A	sn_ent_medical_asset	sn_ent_medical_device_model
Healthcare Device	cmdb_ci_hc_device	sn_ent_medical_asset	sn_ent_medical_device_model
Medical Device	cmdb_ci_med_device	sn_ent_medical_asset	sn_ent_medical_device_model
Patient Monitoring	cmdb_ci_med_patient_monitoring	sn_ent_medical_asset	sn_ent_medical_device_model
Patient Implants	cmdb_ci_med_patient_implant	sn_ent_medical_asset	sn_ent_medical_device_model
Surgical Instruments	cmdb_ci_med_surgical_instrument	sn_ent_medical_asset	sn_ent_medical_device_model
Clinical Devices	cmdb_ci_med_clinical_device	sn_ent_medical_asset	sn_ent_medical_device_model
Lab Equipment	cmdb_ci_med_lab_equipment	sn_ent_medical_asset	sn_ent_medical_device_model
Diagnostic Imaging	cmdb_ci_med_diagnostic_imaging	sn_ent_medical_asset	sn_ent_medical_device_model
Therapeutic Devices	cmdb_ci_med_therapeutic_device	sn_ent_medical_asset	sn_ent_medical_device_model
Dental Equipment	cmdb_ci_med_dental	sn_ent_medical_asset	sn_ent_medical_device_model

Facility model categories

Facility model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Facility General	cmdb_ci_facility_hardware	sn_ent_facility_asset	sn_ent_facility_model
Electrical	cmdb_ci_power_eq	sn_ent_facility_asset	sn_ent_facility_model
Automatic Transfer Switch	cmdb_ci_ats_power_eq	sn_ent_facility_asset	sn_ent_facility_model
Power Generator	cmdb_ci_generator_power_eq	sn_ent_facility_asset	sn_ent_facility_model
Uninterruptible Power Supply	cmdb_ci_ups_power_eq	sn_ent_facility_asset	sn_ent_facility_model

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Facility model categories and corresponding CMDB CI, asset, and model classes (continued)

Model category	CMDB CI class	Asset class	Model class
HVAC	cmdb_ci_hvac	sn_ent_facility_asset	sn_ent_facility_model
Fuel Tank	cmdb_ci_fuel_tank	sn_ent_facility_asset	sn_ent_facility_model
Structure	cmdb_ci_building_facility	sn_ent_facility_asset	sn_ent_facility_model
Plumbing	cmdb_ci_building_plumbing	sn_ent_facility_asset	sn_ent_facility_model
Security	cmdb_ci_security	sn_ent_facility_asset	sn_ent_facility_model
Cameras	cmdb_ci_ip_camera	sn_ent_facility_asset	sn_ent_facility_model
AV Displays	cmdb_ci_display	sn_ent_facility_asset	sn_ent_facility_model
AV Equipment	cmdb_ci_multimedia	sn_ent_facility_asset	sn_ent_facility_model
Service Industry Equipment	cmdb_ci_service_industry_equipment	sn_ent_facility_asset	sn_ent_facility_model
Domestic Appliances	cmdb_ci_domestic_appliance	sn_ent_facility_asset	sn_ent_facility_model
Cleaning Equipment	cmdb_ci_cleaning_equipment	sn_ent_facility_asset	sn_ent_facility_model
Furniture and Fixtures	cmdb_ci_building_furniture	sn_ent_facility_asset	sn_ent_facility_model
Circuit Breaker	cmdb_ci_circuit_breaker	sn_ent_facility_asset	sn_ent_facility_model
Fuse Alarm Panel	cmdb_ci_fuse_alarm_panel	sn_ent_facility_asset	sn_ent_facility_model
Inverter	cmdb_ci_inverter	sn_ent_facility_asset	sn_ent_facility_model
Maintenance Bypass Panel	cmdb_ci_maintenance_bypass_panel	sn_ent_facility_asset	sn_ent_facility_model
Power Panel	cmdb_ci_power_panel	sn_ent_facility_asset	sn_ent_facility_model
Rectifier	cmdb_ci_rectifier	sn_ent_facility_asset	sn_ent_facility_model
Remote Power Panel	cmdb_ci_remote_power_panel	sn_ent_facility_asset	sn_ent_facility_model
Switchgear	cmdb_ci_switchgear	sn_ent_facility_asset	sn_ent_facility_model
Transformer	cmdb_ci_transformer	sn_ent_facility_asset	sn_ent_facility_model

Note: The CI classes of the following facility model categories have Goods [cmdb_ci_good] as their parent CI class:

- Plumbing
- Service Equipment
- Domestic Appliances
- Furniture and Fixtures

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Transportation model categories

Transportation model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Transportation General	cmdb_ci_transport	sn_ent_transportation_asset	sn_ent_transportation_model
Aircraft	cmdb_ci_aircraft	sn_ent_transportation_asset	sn_ent_transportation_model
Ship	cmdb_ci_ship	sn_ent_transportation_asset	sn_ent_transportation_model
Train	cmdb_ci_train	sn_ent_transportation_asset	sn_ent_transportation_model
Vehicle	cmdb_ci_vehicle	sn_ent_transportation_asset	sn_ent_transportation_model

Industrial model categories

Industrial model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Industrial General	cmdb_ci_ot	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control	cmdb_ci_ot_control	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control CNC	cmdb_ci_ot_cnc	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control DCS	cmdb_ci_ot_dcs	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control DPU	cmdb_ci_ot_dpu	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control IED	cmdb_ci_ot_ied	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control 3D Printer	cmdb_ci_ot_industrial_3d_printer	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control OPC Server	cmdb_ci_ot_opc_server	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control Module	cmdb_ci_ot_control_module	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control PLC	cmdb_ci_ot_plc	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control RTU	cmdb_ci_ot_rtu	sn_ent_industrial_asset	sn_ent_industrial_model
OT Control SCADA	cmdb_ci_ot_scada_server	sn_ent_industrial_asset	sn_ent_industrial_model
OT Field Device	cmdb_ci_ot_field_device	sn_ent_industrial_asset	sn_ent_industrial_model

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Industrial model categories and corresponding CMDB CI, asset, and model classes (continued)

Model category	CMDB CI class	Asset class	Model class
OT Field Actuator	cmdb_ci_ot_industrial_actuator	sn_ent_industrial_asset	sn_ent_industrial_model
OT Field Drive	cmdb_ci_ot_industrial_drive	sn_ent_industrial_asset	sn_ent_industrial_model
OT Field Robot	cmdb_ci_ot_industrial_robot	sn_ent_industrial_asset	sn_ent_industrial_model
OT Field Sensor	cmdb_ci_ot_industrial_sensor	sn_ent_industrial_asset	sn_ent_industrial_model
OT Quality Inspection Control System	cmdb_ci_ot_qics	sn_ent_industrial_asset	sn_ent_industrial_model
OT Supervisory	cmdb_ci_ot_supervisory	sn_ent_industrial_asset	sn_ent_industrial_model
OT Supervisory EWS	cmdb_ci_ot_ews	sn_ent_industrial_asset	sn_ent_industrial_model
OT Supervisory Historian	cmdb_ci_ot_historian	sn_ent_industrial_asset	sn_ent_industrial_model
OT Supervisory HMI	cmdb_ci_ot_hmi	sn_ent_industrial_asset	sn_ent_industrial_model
OT Supervisory OPC	cmdb_ci_ot_opc_client	sn_ent_industrial_asset	sn_ent_industrial_model
OT Supervisory SCADA	cmdb_ci_ot_scada_client	sn_ent_industrial_asset	sn_ent_industrial_model
OT Supervisory System	cmdb_ci_ot_supervisory	sn_ent_industrial_asset	sn_ent_industrial_model
Operational Equipment	cmdb_ci_oe	sn_ent_industrial_asset	sn_ent_industrial_model

Retail model categories

Retail model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Retail General	N/A	sn_ent_retail_asset	sn_ent_retail_model
Payment Device	cmdb_ci_payment	sn_ent_retail_asset	sn_ent_retail_model

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Retail model categories and corresponding CMDB CI, asset, and model classes (continued)

Model category	CMDB CI class	Asset class	Model class
POS Device	cmdb_ci_pos	sn_ent_retail_asset	sn_ent_retail_model

Construction model categories

Construction model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Construction General	cmdb_ci_construction	sn_ent_construction_asset	sn_ent_construction_model
Construction Equipment	cmdb_ci_construction_equipment	sn_ent_construction_asset	sn_ent_construction_model
Tools	cmdb_ci_construction_tool	sn_ent_construction_asset	sn_ent_construction_model
Test Tools	cmdb_ci_testing_equipment	sn_ent_construction_asset	sn_ent_construction_model

Note: The CI classes of the following construction model categories have Goods [cmdb_ci_good] as their parent CI class:

- Construction General
- Test Tools

Tactical equipment model categories

Tactical equipment model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Tactical Equipment General	cmdb_ci_tactical_equipment	sn_ent_tactical_asset	sn_ent_tactical_model
Tactical Gear	cmdb_ci_tactical_ppe	sn_ent_tactical_asset	sn_ent_tactical_model
Weapons	cmdb_ci_weapon	sn_ent_tactical_asset	sn_ent_tactical_model
Forensic Supplies	cmdb_ci_forensic_supply	sn_ent_tactical_asset	sn_ent_tactical_model
Ammunition	cmdb_ci_ammunition	sn_ent_tactical_asset	sn_ent_tactical_model

Note: The CI class of the Tactical Equipment General model category has Goods [cmdb_ci_good] as its parent CI class.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Wearable model categories

Wearable model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Wearable Clothing	cmdb_ci_wearable_clothing	sn_ent_wearable_asset	sn_ent_wearable_model
Humanitarian PPE	cmdb_ci_humanitarian_ppe	sn_ent_wearable_asset	sn_ent_wearable_model
Uniforms	cmdb_ci_wearable_uniform	sn_ent_wearable_asset	sn_ent_wearable_model

Multimedia production equipment model categories

Multimedia production equipment model categories and corresponding CMDB CI, asset, and model classes

Model category	CMDB CI class	Asset class	Model class
Media Control and Routing Equipment	cmdb_ci_media_control_routing_equipment	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Contribution Equipment	cmdb_ci_contribution_equipment	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Audio Production Equipment	cmdb_ci_audio_production_equipment	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Video Production Equipment	cmdb_ci_video_production_equipment	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Video Playout Equipment	cmdb_ci_video_playout_equipment	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Video Precision Monitor	cmdb_ci_video_precision_monitor	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Signal Processor and Amplifier	cmdb_ci_signal_processor_amplifier	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Broadcast Sync Generator	cmdb_ci_broadcast_sync_generator	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Teleprompter	cmdb_ci_teleprompter	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Production Camera	cmdb_ci_production_camera	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Multimedia production equipment model categories and corresponding CMDB CI, asset, and model classes (continued)

Model category	CMDB CI class	Asset class	Model class
Stage and Studio Lighting	cmdb_ci_stage_studio_lighting	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod
Multimedia Production Equipment General	cmdb_ci_multimedia_production_equipment	sn_ent_mm_prod_equip_asset	sn_ent_mm_prod

Mandatory fields in the bulk import spreadsheets

A list of the mandatory fields in the model, asset, and model and asset templates for bulk import in the Enterprise Asset Workspace.

Mandatory fields for model template

Field/column	Mandatory for creating models	Mandatory for updating models
Index **Note:** Representing the row number can be used to identify a specific row. However, you must fill this in manually.	Yes	Yes
Manufacturer	Yes	Yes
Model Name	Yes	Yes
Model Number	Yes	Yes
Model category	Yes	Yes
Model type	Yes	Yes
Parent model manufacturer	Yes **Note:** Not applicable for single models.	No
Parent model name	Yes **Note:** Not applicable for single models.	No
Parent model number	Yes **Note:** Not applicable for single models.	No
Component number	Yes	No

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field/column	Mandatory for creating models	Mandatory for updating models
	Note: Not applicable for single models.	
Component quantity	Yes **Note:** Not applicable for single models.	No
Required	Yes **Note:** Not applicable for single models.	No
Hot swappable	Yes **Note:** Not applicable for single models.	No
Repairable	Yes **Note:** Not applicable for single models.	No

Mandatory fields for asset template

Field/column	Mandatory for creating assets	Mandatory for updating assets
Index **Note:** Representing the row number can be used to identify a specific row. However, you must fill this in manually.	Yes	Yes
Manufacturer	Yes	Yes
Model	Yes	Yes
Model Name	Yes	Yes
Model Number	Yes	Yes
Parent model manufacturer	Yes **Note:** Not applicable for single assets.	Yes **Note:** Not applicable for single assets.
Parent model name	Yes **Note:** Not applicable for single assets.	Yes **Note:** Not applicable for single assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field/column	Mandatory for creating assets	Mandatory for updating assets
Parent model number	Yes **Note:** Not applicable for single assets.	Yes **Note:** Not applicable for single assets.
Component number	Yes **Note:** Not applicable for single assets.	Yes
Asset Tag	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.
Serial Number	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.
MAC Address	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.
Parent asset	Conditional **Note:** Required for child assets when parent model information is provided.	Conditional **Note:** Required for child assets when parent model information is provided.
Quantity	Conditional **Note:** Required for consumable assets (positive number).	No **Note:** Consumable assets cannot be updated.
State	Yes	No
Sub state	Yes	No
Stockroom	Conditional	Conditional

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field/column	Mandatory for creating assets	Mandatory for updating assets
	Note: Required for In stock and Build states.	**Note:** Required for In stock and Build states.
Location	Conditional **Note:** Required for In stock, In use, and Build states.	Conditional **Note:** Required for In stock, In use, and Build states.
Install status	Yes	Yes
Substatus	Conditional **Note:** Required for In stock state only.	Conditional **Note:** Required for In stock state only.
Component ID	Conditional **Note:** Required for child assets when applicable.	No
OT entity	Conditional **Note:** Required as **true** for hardware models when the OT Asset Management application is activated.	Conditional **Note:** Required as **true** for hardware models when the OT Asset Management application is activated.

Mandatory fields for model and asset template

Field/column	Mandatory for creating models and assets	Mandatory for updating models and assets
Index **Note:** Representing the row number can be used to identify a specific row. However, you must fill this in manually.	Yes	Yes
Manufacturer	Yes	Yes
Model Name	Yes	Yes
Model Number	Yes	Yes
Model category	Yes	Yes
Model type	Yes	Yes
Parent model manufacturer	Yes	Yes

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field/column	Mandatory for creating models and assets	Mandatory for updating models and assets
	Note: Not applicable for single models and single assets.	
Parent model name	Yes **Note:** Not applicable for single models and single assets.	Yes
Parent model number	Yes **Note:** Not applicable for single models and single assets.	Yes
Component number	Yes **Note:** Not applicable for single models and single assets.	No
Component quantity	Yes **Note:** Not applicable for single models and single assets.	No
Required	Yes **Note:** Not applicable for single models and single assets.	No
Hot swappable	Yes **Note:** Not applicable for single models and single assets.	No
Repairable	Yes **Note:** Not applicable for single models and single assets.	No
Asset Tag	Conditional	Conditional

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field/column	Mandatory for creating models and assets	Mandatory for updating models and assets
	Note: At least one unique identifier is required for non-consumables based on model category.	**Note:** At least one unique identifier is required for non-consumables based on model category.
Serial Number	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.
MAC Address	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.	Conditional **Note:** At least one unique identifier is required for non-consumables based on model category.
Parent asset	Yes **Note:** Not applicable for single models and single assets.	No
Quantity	Yes	No
State	Yes	No
Sub state	Yes	No
Stockroom	Conditional **Note:** Required for In stock and Build states.	Conditional **Note:** Required for In stock and Build states.
Location	Conditional **Note:** Required for In stock, In use, and Build states.	Conditional **Note:** Required for In stock, In use, and Build states.

Unit of measurement fields

Field/column	Mandatory for creating models	Mandatory for updating models
Dimensions Unit	Conditional	Conditional

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field/column	Mandatory for creating models	Mandatory for updating models
	Note: Required if length, width, height, or depth is provided.	**Note:** Required if length, width, height, or depth is provided.
Weight Unit	Conditional **Note:** Required if the weight_decimal value is provided.	Conditional **Note:** Required if the weight_decimal value is provided.
Volume Unit	Conditional **Note:** Required if the volume is provided.	Conditional **Note:** Required if the volume is provided.
Current Unit	Conditional **Note:** Required if the value is provided for Current.	Conditional **Note:** Required if the value is provided for Current.
Power Unit	Conditional **Note:** Required if the rated_power value is provided.	Conditional **Note:** Required if rated_power is provided.
Voltage Unit	Conditional **Note:** Required if the voltage value is provided.	Conditional **Note:** Required if voltage is provided.
Cooling Unit	Conditional **Note:** Required if the cooling value is provided (Enterprise models only).	Conditional **Note:** Required if the cooling value is provided (Enterprise models only).
Pressure Unit	Conditional **Note:** Required if the pressure value is provided (Enterprise models only).	Conditional **Note:** Required if the pressure value is provided (Enterprise models only).
Temperature Unit	Conditional	Conditional

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field/column	Mandatory for creating models	Mandatory for updating models
	Note: Required if the temperature value is provided (Enterprise models only).	**Note:** Required if the temperature value is provided (Enterprise models only).

Reference fields validation

The values entered in the following columns must exist in the database:

- Manufacturer
- Model failure impact
- Model failure likelihood
- Owner
- Stockroom
- Location
- Managed by
- Owned by
- Reserved for
- Supported by
- Vendor
- Asset failure impact
- Asset failure likelihood

Normalization status for enterprise models

Description of the normalization statuses for enterprise models.

Status	Description
New	The model is created and has not yet run through the normalization process.
Normalized	After normalization, values for normalized manufacturer, product, model name, model number and model type are populated. Under specific conditions, certain fields that are typically read-only can be edited.
Partially Normalized	After normalization, values are populated for normalized manufacturer, product, and model type and the model number is blank.
Manufacturer Normalized	After normalization, values for normalized manufacturer is populated and the rest of the columns are blank after normalization.
Match Not Found	The normalization process could not match any of the fields of the model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Status	Description
	Match Not Found status could occur if a normalization rule for the software does not exist.

Model fields for Enterprise Asset Management

A detailed description of all model fields in the Enterprise Asset Management application.

Model Details

Field	Description
Display name	Name of the model. A system property called *glide.cmdb_model.display_name.shorten* controls how software model display names are generated.
Manufacturer	The company that built the model.
Name	The manufacturer-assigned name of the model or abstract name specified by the model manager, such as **Field Agent Laptop**.
Short description	A brief description of the model.
Model categories	The category to which the model belongs to. This is a read-only field.
Model type **Note:** This field doesn't appear if you're creating a pallet model.	Type of multi-component model. The following are the options to choose from: • Simple • Consumable • Pre-assembled • User-assembled
Asset tracking strategy **Note:** This field doesn't appear if you're creating a pallet model.	Process that is used to track the asset. Options are **Leave to category**, **Create consumable asset**, **Don't create assets**.
Asset tracking unit	Unit that is used to measure the asset. Options are **Individual Unit**and **Fixed Fee**.
Acquisition method	The method for purchasing the model. Options are **Both**, **Buy**, or **Lease**.
Model number	The specific model number assigned to the item by the manufacturer.
Barcode	The barcode number assigned to the model. Barcodes are assigned by the manufacturer.
Owner	The person responsible for the model.
Status	The status of the model. By default, the newly created model is in **Build** status. Once you define the model and its components, you can change

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	the status of the model. The other status options are **In Production**, **Retired**, and **Sold**.
Picture	An image that represents the model. Select the **Attach image** link to choose and attach an image. Once you attach the image, the link changes to **View image**.
Certified	The option that determines whether the model is approved for use.
Comments	Information about the model that would be helpful for others to know.
Calculated lifecycle template	Lifecycle template to calculate lifecycle dates. This template can be assigned to models
Calculated lifecycle start date	Start date from which the Phase start date and Phase end date are calculated for each lifecycle phase defined in the Calculated lifecycle template that you selected.

Financials

Field	Description
Cost	The cost of a single unit of the model.
TCO benchmark cost	Specify a TCO benchmark cost for the model.
TCO benchmark threshold	The TCO benchmark threshold is a percentage of the TCO benchmark cost where you want to be alerted that the cost is approaching the benchmark. By default the percentage is 75%. For example, if the TCO benchmark cost is $100 then the TCO benchmark threshold is $75. If you set the TCO benchmark cost, this field is automatically calculated. You can change the percentage in the *asset_tco_benchmark_threshold_percentage* system property.
Average assets TCO	Indicates the average Asset TCO value for all assets in the report source. For example, if you have 10 assets in a report source, and adding up all of the Asset TCO values for all assets totals 100,000, then the average asset TCO is 10,000.
Expenditure type	The type of expenditure. Choose from the following:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. • **Opex**: Operational expenditure is an ongoing expenditure. For example, toners for the photocopier.
Useful life (months)	The number of months that the model can be used for.
Depreciation	The depreciation scheme for the model.
Salvage value	The estimated value that an asset realizes upon its sale at the end of its useful life. This value must be less than or equal to the cost of the asset.

Failure Risk

Values in the **Likelihood** and **Impact** fields appear only if the configuration records for risk likelihood and risk impact are frozen.

Field	Description
Failure likelihood	The likelihood values for the risk score. The configuration values that you created for risk likelihood appear as options in this field. The options appear in the format of `value-label`. For example, `1-Low` where 1 is the value and Low is the label. For details, see Create configuration values for risk likelihood.
Failure impact	The impact values for the risk score. The configuration values that you create for risk impact appear as options in this field. The options appear in the format of `value-label`. For example, `2-Medium` where 2 is the value and Medium is the label. For details, see Create configuration values for risk impact.
Failure risk score	The risk score is automatically populated based on the likelihood and impact values.

Normalization

Field	Description
Normalized manufacturer	Normalized name of the manufacturer.
Normalized model name	Normalized name of the model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Normalized model number	Normalized number of the model.
Normalization status	Current normalization status of the model.
Normalized model type	Normalized type of the model.
Exclude from sharing with content service	Option that excludes specific content from being shared with the Enterprise Asset Management Content Service. This option is applicable only if you have opted in to the Enterprise Asset Management Content Service.

Product Catalog

Note: The Product Catalog fields only appear for consumable models.

Field	Description
Catalog Item	Name of the catalog item.
Description	Description of the catalog item.
Picture	Picture depicting the product model.

Model Components tab

Use this tab to create model components. One or more than one model components is required to create a multi-component model.

Note: The Model components tab is visible only if the model is a multi-component model. If the **Multi-component** field on the Model page has either of the two values: **Pre-assembled** or **User-assembled**, the Model Components tab is visible. If the **Multi-component** field has the value **Not Applicable**, the Model Components tab is not visible.

Field	Description
Model category of component	Model category of the component.
Component	Component of the model. Only model components that belong to the model category you selected appear in this list.
Required	If the check box is selected, the model component is required for the complex model to work and can't be permanently removed.
Hot swappable	By default, this check box is selected. Indicates that the model component can be swapped while the multi-component model is operational. This check box is selected by default.
Repairable	Indicates that the model component can be repaired. This check box is selected by default.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise Model Lifecycles tab

Use this tab to specify life cycle information for the enterprise model.

Field	Description
Model	Name of the model.
Lifecycle type	Type of lifecycle. • **Internal** • **Publisher**
Lifecycle phase	Phase of the life cycle for a enterprise model. • **General Availability:** The date when the enterprise model becomes generally available through the manufacturer's sales channels, including its worldwide subsidiaries, affiliates, and country distributors. The enterprise model is considered current/active and receiving support from the manufacturer. • **End of Sale:**The last date to order the enterprise model through the manufacturer's sales channels, including its worldwide subsidiaries, affiliates, and country distributors. After end of sale date, the enterprise model is no longer available for sale. • **End of Support**: The last date upon which the manufacturer provides standard/regular support for the enterprise model as entitled by active service contracts. After this date, the manufacturer may continue to provide active support for certain issues in a limited capacity, the scope of which may vary across different manufacturers according to their lifecycle and/or support policies. • **End of Extended Support:** Up until this date, the manufacturer extends limited support for the enterprise model (after standard/regular support expires), for a defined period according to manufacturer policy. • **End of Life:**The date which indicates the enterprise model is at the end of its useful life (from the manufacturer's point of view). The manufacturer stops marketing, selling, or sustaining the enterprise model.
Source	Source of the lifecycle of the model.
Description	Description of the lifecycle.
Phase start date	Date the lifecycle phase starts.
Phase end date	Date the lifecycle phase ends.
Risk	Risk associated with the lifecycle. • Very High • High • Moderate • Low • None
Active	Indicates that the lifecycle of the model is active.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Vendor Catalog Items tab

Note: The Vendor Catalog Items tab appears only for consumable models.

Field	Description
Name	Display name of the vendor catalog item.
Vendor	Name of the product vendor.
Product Model	Product model associated with the vendor catalog item.
Out of Stock	Option that indicates if the product is out of stock.
Application	Application that contains the product record.
Product ID	Manufacturer product ID.
List Price	List price of the product before any discounts are applied.
Vendor Price	Vendor price of the product.
Rank tier	Vendor rank tier.
Short Description	Description of the product.
General	
Product Catalog Item	Product catalog item that was created when the item was published.
UPC	Universal Product Code (UPC) of the product.
Description	Description of the product.
Picture	Picture of the product.
Active	Option that indicates if the product is active or not.
Information	
Specifications	Product specifications that come from the vendor.
Features	Product features that come from the vendor.

Contract fields for Enterprise Asset Management

A detailed description of all contract fields in the Enterprise Asset Management application.

Contract

Field	Description
Vendor	Vendor that is associated with the lease contract.
Contract number	Unique number that is used to identify and track the lease contract. You can obtain this number from the vendor.
Name	Name of the lease contract.
Parent contract	Parent contract that the lease contract is associated with.
Start date	Date on which the lease contract begins.
End date	Date on which the lease contract ends.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Contract administrator	User who manages the lease contract and communicates with the vendor.
Approver	User who approves or rejects the lease contract.
Business owner	User who manages the lease contract from a business perspective.
Description	Description of the lease contract.

Financial

Field	Description
Invoice payment terms	Terms that describe how and when you must make payments for the lease contract.
Payment schedule	Frequency at which you must make each lease contract payment.
Payment amount	Amount that you must pay for each lease contract payment. **Note:** You can set this field to any currency of your choice.
Applicable taxes	Taxes that are applied to the lease contract. Select one of the following options: • **Exempt**: The lease contract is exempt from taxes. • **Sales**: Sales taxes are applied to the lease contract.
Lease term (months)	Length of the lease contract, in months.
Vendor account	Vendor account to which you must make each lease contract payment.
Purchase order	Purchase order that is associated with the lease contract.
Cost center	Cost center that is financially responsible for the lease contract.
Has rate card	Option that indicates if the lease contract has an associated contract rate card, which provides detailed cost information for the contract. See Create a contract rate card for more information on contract rate cards.

Maintenance plan fields for Enterprise Asset Management

A detailed description of all maintenance plan fields in the Enterprise Asset Management application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Maintenance Plan

Field	Description
Active	Option that indicates if the maintenance plan is active.
Name	Name of the maintenance plan.
Short description	Brief description of the maintenance plan.

Target Assets

Field	Description
Table	Target Enterprise Asset Management table that lists the enterprise assets that you want to apply the maintenance plan to. The default table is **Enterprise asset**.
Filter conditions	Filter conditions that enable you to apply the maintenance plan to only specific subsets of enterprise assets. You can add multiple filter conditions to a single maintenance plan using the following options: • **or**: Enables you to specify any of the conditions that an enterprise asset can meet to have the maintenance plan applied to it. • **and**: Enables you to specify all the conditions that an enterprise asset must meet to have the maintenance plan applied to it. • **+ New condition set**: Enables you to specify additional sets of conditions that an enterprise asset can meet to have the maintenance plan applied to it.
Apply to new matching records	Option to apply the maintenance plan to any subsequent enterprise assets that are added to the target Enterprise Asset Management table and meet the specified filter conditions.
Task creation policy	Policy that specifies what action you want to take when the maintenance plan is applied to an enterprise asset that is already under maintenance. Select one of the following options: • **Leave alone**: Prevents the creation of tasks for the new maintenance plan and the deletion of tasks that are associated with the existing maintenance plan. • **Cancel existing**: Deletes all tasks that are associated with the existing maintenance plan. • **Add to existing**: Adds both new tasks and existing active tasks to the new maintenance plan.

Maintenance schedule fields for Enterprise Asset Management

A detailed description of all maintenance schedule fields in the Enterprise Asset Management application.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Maintenance Schedule

Field	Description
Name	Name of the maintenance schedule.
Short description	Brief description of the maintenance schedule.
Trigger	Trigger that specifies the type of conditions that must be met for the maintenance to run. Select one of the following options: • **Duration**: Triggers the maintenance to run based on time. If you select this option, the Duration Details form section appears, where you can specify more details about the trigger. • **Meter**: Triggers the maintenance to run based on a specific enterprise asset field value. If you select this option, the Meter Details form section appears, where you can specify more details about the trigger. • **Condition**: Triggers the maintenance to run based on filter conditions. If you select this option, the Condition Details form section appears, where you can specify more details about the trigger. • **Script**: Triggers the maintenance to run based on advanced script criteria. If you select this option, the Script Details form section appears, where you can specify more details about the trigger. • **Duration or Meter**: Triggers the maintenance to run based on time or a specific enterprise asset field value, whichever comes first. If you select this option, the Duration Details and Meter Details form sections appear, where you can specify more details about the trigger.
Active	Option that indicates if the maintenance schedule is active.

Duration Details

Note: This form section appears only if you set the **Trigger** field to **Duration** or **Duration or Meter** in the Maintenance Schedule form section.

Field	Description
Trigger type	Frequency at which you want the maintenance to run. Select one of the following options: • **Interval**: Runs the maintenance at a specified time interval. If you select this option, the **Days**, **Hours**, **Minutes**, and **Seconds** fields appear, where you can specify the amount of time that must pass before the maintenance runs again. • **Weekly**: Runs the maintenance once a week. If you select this option, the**Due day of week** and **Due time** fields appear, where you can specify the day and time at which you want the maintenance to run each week. • **Monthly**: Runs the maintenance once a month on a specific date. If you select this option, the **Due day of month** and **Due time** fields appear, where you can specify the date and time at which you want the maintenance to run each month.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Annually**: Runs the maintenance once a year on a specific date and month. If you select this option, the **Due month**, **Due day of month**, and **Due time** fields appear, where you can specify the month, date, and time at which you want the maintenance to run each year. • **Week in Month**: Runs the maintenance once a month during a specific week of the month. If you select this option, the **Due week in month** and **Due time** fields appear, where you can specify the week and time at which you want the maintenance to run each month. • **Day in Week in Month in Year**: Runs the maintenance once a year on a specific day, week, and month. If you select this option, the **Due month**, **Due week in month**, **Due day of week**, and **Due time** fields appear, where you can specify the month, week, day, and time at which you want the maintenance to run each year.
Lead time	Number days required for the scheduled maintenance work.

Meter Details

Note: This form section appears only if you set the **Trigger** field to **Meter** or **Duration or Meter** in the Maintenance Schedule form section.

Field	Description
Field	Enterprise asset field that you want to match against to trigger the maintenance to run.
Every	Field value that an enterprise asset must match to trigger the maintenance to run.

Condition Details

Note: This form section appears only if you set the **Trigger** field to **Condition** in the Maintenance Schedule form section.

Field	Description
Filter Condition	Filter conditions that trigger the maintenance to run You can add multiple filter conditions to the trigger using the following options: • **or**: Enables you to specify any of the conditions that an enterprise asset can meet to trigger the maintenance to run. • **and**: Enables you to specify all the conditions that an enterprise asset must meet to trigger the maintenance to run. • **+ New condition set**: Enables you to specify additional sets of conditions that an enterprise asset can meet to trigger the maintenance to run.

Script Details

Note: This form section appears only if you set the **Trigger** field to **Script** in the Maintenance Schedule form section.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Script	Script specifying the advanced criteria that triggers the maintenance to run.

Work plan fields for Enterprise Asset Management

A detailed description of all work plan fields in the Enterprise Asset Management application.

Work Plan

Field	Description
Number	Unique number for the work plan.
Name	Name of the work plan.
Short description	Brief description of the work plan.
Effective start	Effective start date from when the work plan is active.
Effective end	Effective end date until when the work plan is active.
Active	Option that indicates if the work plan is available to use.
Forecast work orders	Option to specify if this work plan is applicable to estimate and generate the upcoming work orders. If this option is selected, you can view the **Generate work orders** option by selecting the **More Actions** ellipsis icon. This generates a work order for the schedule per asset.

Conditions

Field	Description
Table	Target Enterprise Asset Management table that the work plan is associated with. The default table is **Enterprise asset**.
Category	Determine whether the work plan is applicable for either category: original equipment scheduling (OEM) or alternative equipment scheduling (AEM).
Apply to new matching records	Option to apply the work plan to any subsequent enterprise assets that are added to the target Enterprise Asset Management table and meet the specified filter conditions.
Task creation policy	Specify what to do when a work plan runs based on a schedule occurrence that is already in progress. Select one of the following options:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Leave alone**: Prevents the creation of tasks for the new work plan and the deletion of tasks that are associated with the existing work plan. • **Cancel existing**: Deletes existing tasks associated with the plan and creates tasks to replace them. • **Add to existing**: Allows new tasks to replace the existing active tasks for the specific schedule occurrence of a plan.
Filter conditions	Filter conditions that enable you to apply the work plan to specific subsets of enterprise assets. You can add multiple filter conditions to a single work plan using the following options: • **or**: Enables you to specify any of the conditions that an enterprise asset can meet to have the maintenance plan applied to it. • **and**: Enables you to specify all the conditions that an enterprise asset must meet to have the maintenance plan applied to it. • **+ New condition set**: Enables you to specify additional sets of conditions that an enterprise asset can meet to have the maintenance plan applied to it.

Work plan schedule fields for Enterprise Asset Management

A detailed description of all the work plan schedule fields in the Enterprise Asset Management application.

Planned Work Schedule

Field	Description
Name	Name of the work plan schedule.
Short description	Brief description of the work plan schedule.
Trigger	Trigger that specifies the type of conditions that must be met for the work plan to run. Select one of the following options: • **Duration**: Triggers the work plan to run based on time. If you select this option, the Duration Details form section appears, where you can specify more details about the trigger. • **Meter**: Triggers the work plan to run based on a specific enterprise asset field value. If you select this option, the Meter Details form section appears, where you can specify more details about the trigger. • **Condition**: Triggers the work plan to run based on filter conditions. If you select this option, the Condition Details form section appears, where you can specify more details about the trigger. • **Script**: Triggers the work plan to run based on advanced script criteria. If you select this option, the Script Details form section appears, where you can specify more details about the trigger.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Duration or Meter**: Triggers the work plan to run based on time or a specific enterprise asset field value, whichever comes first. If you select this option, the Duration Details and Meter Details form sections appear, where you can specify more details about the trigger.
Active	Option that indicates if the work plan schedule is active.

Duration Details

Note: This form section appears only if you set the **Trigger** field to **Duration** or **Duration or Meter** in the Planned Work Schedule form section.

Field	Description
Trigger type	Frequency at which you want the work plan to run. Select one of the following options: • **Interval**: Runs the work plan at a specified time interval. If you select this option, the **Days**, **Hours**, **Minutes**, and **Seconds** fields appear, where you can specify the amount of time that must pass before the work plan runs again. • **Weekly**: Runs the work plan once a week. If you select this option, the **Due day of week** and **Due time** fields appear, where you can specify the day and time at which you want the work plan to run each week. • **Multiple days of the week**: Runs the work plan multiple days in a week. If you select **Multiple days of the week**, the Due days of week field appears so you can specify on which days in a week the planned work should be performed. • **Monthly**: Runs the work plan once a month on a specific date. If you select this option, the **Due day of month** and **Due time** fields appear, where you can specify the date and time at which you want the work plan to run each month. • **Annually**: Runs the work plan once a year on a specific date and month. If you select this option, the **Due month**, **Due day of month**, and **Due time** fields appear, where you can specify the month, date, and time at which you want the work plan to run each year. • **Week in Month**: Runs the work plan once a month during a specific week of the month. If you select this option, the **Due week in month** and **Due time** fields appear, where you can specify the week and time at which you want the work plan to run each month. • **Day in Week in Month in Year**: Runs the work plan once a year on a specific day, week, and month. If you select this option, the **Due month**, **Due week in month**, **Due day of week**, and **Due time** fields appear, where you can specify the month, week, day, and time at which you want the work plan to run each year.
Lead time	Number of days required for the scheduled work plan.
Preserve calculated interval	Option to restart the interval calculation from the time when the work order was completed. This check box appears when **Interval**, **Monthly**, or **Annually** is selected for **Trigger type** and **Fixed** is selected for the **Monthly type** and **Annually type** field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Meter Details

Note: This form section appears only if you set the **Trigger** field to **Meter** or **Duration or Meter** in the Planned Work Schedule form section.

Field	Description
Field	Enterprise asset field that you want to match against to trigger the work plan to run.
Every	Field value that an enterprise asset must match to trigger the work plan to run.
Preserve calculated meter	Option to restart the meter calculation based on the value defined in the **Every** field.

Condition Details

Note: This form section appears only if you set the **Trigger** field to **Condition** in the Planned Work Schedule form section.

Field	Description
Filter Condition	Filter conditions that trigger the work plan to run You can add multiple filter conditions to the trigger using the following options: • **or**: Enables you to specify any of the conditions that an enterprise asset can meet to trigger the work plan to run. • **and**: Enables you to specify all the conditions that an enterprise asset must meet to trigger the work plan to run. • **+ New condition set**: Enables you to specify additional sets of conditions that an enterprise asset can meet to trigger the work plan to run.

Script Details

Note: This form section appears only if you set the **Trigger** field to **Script** in the Planned Work Schedule form section.

Field	Description
Script	Script specifying the advanced criteria that trigger the work plan to run.

Effectivity Details

Field	Description
Start planned	Option based on which the planned work schedule should determine its start date.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
schedule on	• Date • Field Value • Schedule
Effective Start	Effective start date from when the planned work is scheduled to work.
Effective start reference	Field value that should be used to determine the start date of the planned work. Effective start reference displays the list of fields from the table that is selected to create conditions for the work plan. For example, Printer [cmdb_ci_printer]. This field appears only when **Field Value** is selected from **Start planned schedule based on**.
Schedule	Name of the schedule that should be used to calculate the start date of the work plan. This field appears only when **Schedule** is selected from **Start planned schedule based on**.
End planned schedule based on	Determines the end date of a planned work schedule. • Date • Field Value • Frequency

Expense line fields for Enterprise Asset Management

A detailed description of all expense line fields in the Enterprise Asset Management application.

Expense Line

Field	Description
Number	Unique number that is used to identify and track the expense line. This field populates automatically.
Date	Date on which you are creating the expense line. This field is automatically set to the current date.
Inherited	Option that indicates if the expense line is inherited from a parent expense line. If you enable this option, the **Parent** field appears below the **Inherited** field. In the **Parent** field, search for and select the parent expense line that this expense line is inherited from. The following fields are then inherited from the parent expense line and can no longer be modified: • **Source ID** • **Asset** • **Contract** • **User**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Configuration Item** • **Task** • **Cost center**
Source ID	Enterprise asset that you want to associate with the expense line. Based on the enterprise asset that you select, the corresponding fields in the Source form section populate automatically.
Amount	Cost of the enterprise asset that you want to associate with the expense line. To indicate that you have received a credit towards the enterprise asset, enter a negative number. **Note:** You can set this field to any currency of your choice.
Process date	Date and time at which the expense line is processed.
State	State of the expense line.
Summary type	Expense line category. Select one of the following options: • **Grow Business**: Expense lines for enterprise assets that are used to help your business grow. • **Run Business**: Expense lines for enterprise assets that are used to help your business run. • **Transform Business**: Expense lines for enterprise assets that are used to help transform your business.
Short description	Brief description of the expense line.

Source

Field	Description
Asset	Enterprise asset that you want to associate with the expense line.
Fixed asset	Fixed asset that contains the selected enterprise asset. A fixed asset is a container that holds one or more individual assets. If the enterprise asset that you selected in the **Asset** field is contained within a fixed asset, the **Fixed asset** field populates automatically.
Contract	Contract that the selected enterprise asset is associated with.
User	User who the selected enterprise asset is assigned to.
Configuration item	Configuration item (CI) that is associated with the expense line.
Task	Task that is associated with the expense line.
Cost center	Cost center that is financially responsible for the selected enterprise asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Fields inherited from a parent asset group to a sub group

A list of all the fields that are inherited from the parent asset group to a subgroup.

Column label	Inherited from parent?	Appears on asset group form
Assigned	Yes, if empty; can be edited.	Yes
Assigned to	Yes, if empty; can be edited.	Yes
Company	Yes, if empty; can be edited.	Yes
Cost Center	Yes, if empty; can be edited.	No
Department	Yes, if empty; can be edited.	Yes
Life cycle stage	Yes	No
Life cycle stage status	Yes	No
Location	Yes, if empty; can be edited but must be a location that descends from the parent group's location.	Yes
Managed by	Yes, if empty; can be edited.	Yes
Owned by	Yes, if empty; can be edited.	Yes
Retired date	Yes	Yes
State	Yes, can be edited.	Yes
Sub state	Yes; can be edited.	Yes
Support group	Yes, if empty; can be edited.	Yes
Supported by	Yes, if empty; can be edited.	Yes

Enterprise asset disposal order stages

An enterprise asset disposal order goes through various stages in the disposal process before it's completed. With each stage, the task that's associated with that stage changes too.

Closing a task in the asset disposal process completes that task and automatically creates the next task in the process. For example, after you close the Schedule Pickup task, the state for that task changes to Closed Complete and the next task, Asset Departure, is created. This process continues until you close all the tasks required for disposing of the selected assets. After you close all the tasks, the disposal order is completed.

Enterprise asset disposal order stages

Enterprise disposal stages	Task	Description
Draft	Verify Assets	Asset disposal record is created.
Scheduling	Schedule Pickup	Scheduling details for the asset disposal order.
Transit	Asset Departure	Verified assets are ready for departure.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Enterprise asset disposal order stages (continued)

Enterprise disposal stages	Task	Description
Confirmation	Vendor Confirmation	Asset disposal order is confirmed by the vendor.
Documentation	Disposal Documentation	Documentation for the disposal record is attached.
Completed	None	Asset disposal record request is completed.
Cancelled	None	Disposal order can be canceled only until the transit stage.

Terminology for linear assets

Terms commonly used for linear assets in the Enterprise Asset Management application.

Linear asset terms and their description

Term	Description
Linear asset	An asset that has a physical length or dimension, such as roads, railways, pipelines, and power transmission lines. Linear assets have a series of geopoints; at least a start and end point and have segments with different attributes.
Geo point	Geo points, or graphical coordinates, are a way of expressing a location on the earth's surface using a set of numerical values. Geo points consists of latitudes, longitudes, and altitudes and can be visualized on a map. In the Enterprise Asset Management application, geo point latitude and longitude refer to the coordinate format defined by WGS 84 and uses signed#decimal degrees.
Route	Geo points of a linear asset form a route. Routes can be plotted and visualized on a map.
Boundary width	Maximum width of the linear asset. It's used to validate whether a cmn_location is on-route or not.
Marker	A point location that can be identified on or near a linear asset. A marker should contain a geo point so it can be visualized on a map.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Term	Description
	If the geo point is on the route of the linear asset, then it's an on-route marker.
Segment	A section of a linear asset with certain attributes. A segment consists of a start point and an end point, or a start point and length.
Discrete asset	Discrete assets are enterprise assets and consumables. Discrete assets can be associated to a linear asset and be managed as part of the linear asset.
Overlap asset	A linear asset relationship where two or more linear assets are in close proximity and within the boundary width. For example, a northbound and a southbound highway. A linear asset can be defined for a northbound highway and another linear asset for a southbound highway.
Intersect asset	A linear asset relationship where linear assets have an intersect point. For example, intersecting roads, where two or more roads meet or cross each other.
Continue asset	A linear asset relationship for linear assets that have a start and an end marker. For example, a highway that after a particular point changes into another highway.

Scheduled jobs and tables installed with normalization of firmware models

Scheduled jobs that run during the normalization of firmware models embedded into Operational Technology (OT) assets and tables that store firmware normalization details are installed with the OT Asset Management application.

Scheduled jobs for Firmware normalization

Scheduled job	Description
Firmware Content Upload	• Uploads data from the firmware tables to the CDS Client Staging [cds_client_staging] table. • Skips the upload if Content Data Service (CDS) hasn't pulled all data. • Uses the Firmware configuration [sn_itam_firmware_configuration] table to identify the firmware tables from which the content should be pushed. • Skips the upload if normalization hasn't run after the latest pull.
Firmware Content File Manager	Triggers during on-premise content import and export actions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Scheduled jobs for Firmware normalization (continued)

Scheduled job	Description
Firmware – Daily Job	• Sets the time when the data is pulled by the Content Data Service (CDS). • Sets current life-cycle phase of model life cycles.
Firmware – Apply latest content changes	Processes changes in the content tables after content pull.
Firmware - Generate Lifecycles	Updates firmware model records with the recently updated content life-cycle details. This is a weekly job.
Firmware Normalization	Normalizes firmware models using the newly downloaded content.

Tables installed with firmware model normalization

Table	Description
Firmware model normalization [sn_itam_firmware_model_norm]	Stores the normalization rule and hash used to perform normalization of firmware models.
Firmware product [sn_itam_firmware_product]	Stores firmware product records.
Custom firmware product [sn_itam_cust_firmware_product]	Stores custom firmware product records.
Firmware product version [sn_itam_firmware_product_version]	Stores firmware product version records.
Custom firmware product version [sn_itam_cust_firmware_product_version]	Stores version records of custom firmware products.
Firmware publisher [sn_itam_firmware_publisher]	Stores firmware publisher records.
Custom firmware publisher [sn_itam_cust_firmware_publisher]	Stores custom firmware publisher records.
Firmware lifecycle definition [sn_itam_firmware_lifecycle_def]	Stores the life-cycle phase of firmware models. Also stores the start and end date of each life-cycle phase.
Firmware model lifecycle [sn_itam_firmware_model_lifecycle]	Stores life-cycle definitions of firmware models.
Firmware normalization map [sn_itam_firmware_norm_mapping]	Stores the hash values that are used to normalize discovered firmware models.
Firmware CPE mapping [sn_itam_firmware_cpe_mapping]	Stores details of mapping between firmware and CPE.
Custom firmware CPE mapping [sn_itam_cust_firmware_cpe_mapping]	Stores custom firmware and CPE mapping details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tables installed with firmware model normalization (continued)

Table	Description
Firmware content audit [sn_itam_firmware_content_audit]	Stores content values that changed.
Manage firmware library [sn_itam_firmware_manage_library]	Stores import and export content data.
Firmware configuration [sn_itam_firmware_configuration]	Stores opt-in and opt-out data.

Asset put away task fields

Fields on the Asset put away task form help you create a put away task for the in stock assets.

Create New Asset put away task form

Field	Description
Number	This field is automatically set to the Asset put away task number.
State	Displays the current state of the Asset put away task. When a new task is created, this field is automatically set to **Open**.
Asset	Asset for which the put away task is created. All the in stock assets are listed.
Task name	This field is automatically set to **Put away**.
Stockroom	This field is automatically populated when the asset is selected.
Assignment group	Assignment group to which you want to assign the Asset put away task.
Drop off location	Aisle and space in the stockroom where you want to put away the hardware asset. This value is required to close the Asset put away task.
Assigned to	Person from the assignment group who is primarily responsible for the Asset put away task.
Due date	Date by which the Asset put away task should be closed.
Notes	The **Short description** and **Description** field values are automatically populated.

Industry-specific Enterprise Asset Management solutions

Extend Enterprise Asset Management (EAM) capabilities for specific industries, operational environments, and asset management needs using specialized applications.

Enterprise Asset Management includes a set of specialized applications that expand its core capabilities for specific industries, operational environments, and workspace configurations. Each application is installed separately from core EAM and activated based on your

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

organization's industry, asset types, or operational requirements — not all applications are required for every deployment.

Industry-specific EAM applications

Application	Description
Enterprise Asset Management for Healthcare	Extends EAM to manage medical equipment and healthcare facility assets.
Enterprise Asset Management for Facilities	Extends EAM to manage facility assets.
OT Asset Management	Extends EAM to manage operational technology assets.
Enterprise Asset Management for Data Center and Network Asset Management (DCNAM)	Extends EAM to manage data center and network infrastructure assets.
Enterprise Asset Management for Providers	Extends EAM to support device-as-a-service (DaaS) asset management, including RMA response orders and inbound asset orders.

Enterprise Asset Management for Healthcare

The Enterprise Asset Management for Healthcare application is a licensable application that on activation enables you to manage healthcare-specific models, assets, and workflows.

The Enterprise Asset Management for Healthcare (com.sn_eamhc) application is available on the ServiceNow Store. When you install this application on your ServiceNow instance, the Enterprise Asset Management application also gets installed. For more information, see Installed with Enterprise Asset Management for Healthcare.

This application provides functionalities, features, and workflows of Enterprise Asset Management that support healthcare-related roles and asset models.

Related topics

Exploring Enterprise Asset Management

Installing Enterprise Asset Management for Healthcare

Install the Enterprise Asset Management for Healthcare application so that you can manage the life cycles of your healthcare-specific assets. You can install the application from either the ServiceNow® Store or the Admin Home page.

Install Enterprise Asset Management for Healthcare from the ServiceNow® Store

You can install the Enterprise Asset Management for Healthcare application (com.sn_eamhc) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

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

Role required: admin

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

The following items are installed with Enterprise Asset Management for Healthcare:

- Store applications
- Roles
- Plugins

For more information, see Installed with Enterprise Asset Management for Healthcare.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Enterprise Asset Management for Healthcare application (com.sn_eamhc) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you 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**.

Install Enterprise Asset Management for healthcare from the Admin Home page

You can install the Enterprise Asset Management for Healthcare application (com.sn_eamhc) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

The following items are installed with Enterprise Asset Management for Healthcare:

- Plugins
- Store applications
- Roles

For more information, see Installed with Enterprise Asset Management for Healthcare.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Open the Admin Home page.
   The Admin Home page is the first page that opens when you log in to your ServiceNow instance. To navigate back to the Admin Home page from any other page, use one of the following options:
   - From the header of your ServiceNow instance, navigate to **Admin** > **Admin Home**. The Admin Home page launches in a new browser tab.
   - On the header of your ServiceNow instance, select the ServiceNow logo.
2. In the Manage your products section of the Admin Home page, select **View product overview** on the **Enterprise Asset Management for Healthcare** card.

   Note: The Admin Home page displays cards for only the applications that you're entitled to.

   The Product Hub opens.
3. In the Apps and plugins section of the Product Hub, select the **Not installed** tab.
4. Locate the **Enterprise Asset Management for Healthcare** card and then select the installation icon .

Result

After the application is installed successfully, the card moves from the **Not installed** tab to the **Installed** tab. You can view additional details about the application, including the application version, release compatibility, and dependencies, by selecting the Open Application Manager icon on the card.

Installed with Enterprise Asset Management for Healthcare

Several types of components are installed with activation of the com.sn_eamhc plugin, including user roles and applications.

Roles installed

Role title [name]	Description	Contains roles
Medical asset manager [sn_eamhc.medical_asset_manager]	Manages healthcare-specific models and assets in Enterprise Asset Workspace	sn_eam.enterprise_asset_manager
Medical asset technician [sn_eamhc.medical_asset_technician]	Performs tasks related to healthcare-specific assets.	sn_eam.enterprise_asset_technician

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Applications installed

Name	Description
ServiceNow Enterprise Asset Management (com.sn_eam)	Manages the complete life cycles of your enterprise connected and non-connected assets. For details on the components that are installed with the Enterprise Asset Management application, see Components installed with Enterprise Asset Management.

OT Asset Management

Operational Technology (OT) Asset Management is a specialized offering within the suite of Enterprise Asset Management solutions for managing Operational Technology (OT) and Operational Equipment (OE) assets. With OT Asset Management, you can effectively manage the lifecycle of OT and OE assets.

OT Asset Management is a licensable application that helps you to manage assets of the Industrial model category for Operational Technology. The OT Asset Management (com.sn_otam) application is available on the ServiceNow Store. When this application is installed on your ServiceNow instance, the Enterprise Asset Management application also gets installed. For more information, see Install OT Asset Management from the ServiceNow Store.

The OT Asset Management application provides the functionalities, features, and workflows of Enterprise Asset Management that support roles related to Operational Technology.

Installing OT Asset Management

Install the OT Asset Management application so that you can manage the life cycles of your Operational Technology (OT) assets. You can install the application from either the ServiceNow® Store or the Admin Home page.

Install OT Asset Management from the ServiceNow® Store

You can install the OT Asset Management application (com.sn_otam) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with OT Asset Management:

- Plugins
- Store applications
- Roles

For more information, see Installed with OT Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the OT Asset Management application (com.sn_otam) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you're 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**.

Install OT Asset Management from the Admin Home page

You can install the OT Asset Management application (com.sn_otam) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

The following items are installed with OT Asset Management:

- Plugins
- Store applications
- Roles

For more information, see Installed with OT Asset Management.

Procedure

1. Open the Admin Home page.
   The Admin Home page is the first page that opens when you log in to your ServiceNow instance. To navigate back to the Admin Home page from any other page, use one of the following options:
   - From the header of your ServiceNow instance, navigate to **Admin** > **Admin Home**. The Admin Home page launches in a new browser tab.
   - On the header of your ServiceNow instance, select the ServiceNow logo.
2. In the Manage your products section of the Admin Home page, select **View product overview** on the **OT Asset Management** card.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The Admin Home page displays cards for only the applications that you're entitled to.

The Product Hub opens.

3. In the Apps and plugins section of the Product Hub, select the **Not installed** tab.
4. Locate the **OT Asset Management** card and then select the installation icon .

Result

After the application is installed successfully, the card moves from the **Not installed** tab to the **Installed** tab. You can view additional details about the application, including the application version, release compatibility, and dependencies, by selecting the Open Application Manager icon on the card.

Installed with OT Asset Management

Several types of components are installed with activation of the com.sn_otam plugin, including user roles and applications.

Roles installed

Role title [name]	Description	Contains roles
OT asset manager [sn_otam.ot_asset_manager]	Manages Operational Technology-specific models and assets in the OT Asset Workspace.	sn_eam.asset_manager
OT asset technician [sn_otam.ot_asset_technician]	Performs tasks related to Operational Technology-specific assets in the OT Asset Workspace.	sn_eam.asset_technician

Applications installed

Name	Description
ServiceNow Enterprise Asset Management (com.sn_eam)	Manages the complete life cycles of your enterprise connected and non-connected assets. For details on the components that are installed with the Enterprise Asset Management application, see Components installed with Enterprise Asset Management.
Hardware Asset Management (sn_hamp)	Provides advanced workflow, automation, and mobile capabilities that enable you to manage the complete life cycles of your organizational assets, including hardware and consumable assets. For details on the components that are installed with the Hardware Asset Management application, see Installed with Hardware Asset Management.
Industrial Core (sn_ot_core)	Enables the packaging of prerequisite tables for integrations and OT licensing.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name	Description
	For more information on Industrial Core, see Industrial Core plugin.

OT Asset Workspace

The OT Asset Workspace is the intuitive and streamlined user interface of the OT Asset Management application to manage your Operational Technology (OT) and Operational Equipment (OE) assets.

OT Asset Workspace overview

The OT Asset Workspace is a unified medium with multiple views that help you manage your OT and OE assets efficiently. The views provide you with visibility into all the important aspects of your assets, such as dashboards on Asset count by model, lifecycle state, model category, and overall performance of assets.

OT Asset Workspace roles

Role title	Contains roles	Description
OT asset manager [sn_otam.ot_asset_manager]	• model_manager • model_admin	This role has full access to the OT Asset Workspace. **Note:** Given that this role is part of the Enterprise Admin (sn_eam.enterprise_admin) role, the Enterprise Admin role also has complete access to the OT workspace.
OT technician sn_otam.ot_asset_technician	• sn_eam.asset_technician • sn_eam.enterprise_mobile_user • canvas_user	This role is for users who perform tasks and update OT hardware asset records as part of the OT hardware asset lifecycle.

OT Asset Workspace views

Efficiently manage your assets by utilizing the different views available in the OT Asset Workspace.

The following table mentions all the views that the OT Asset Workspace consists of, a brief description of each view, and the tabs or lists that are present in each view:

Name of the view	Description of the view	Tabs/lists in the view
OT asset overview	View important actions and quick links to active tasks.	No tabs in this view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name of the view	Description of the view	Tabs/lists in the view
Asset analytics	Manage resources efficiently by tracking the Total Cost of Ownership (TCO) of assets.	**Overview**, **Asset TCO**, **Asset performance**, and **Data visualizations**.
Inventory	View details of the entire asset inventory and stockrooms that enable you to perform inventory tasks.	**Overview**, **All stockrooms**,**Stock rules**, **Transfer orders**, **Asset audits**,**Loaner asset orders**, **RMA orders**, **RMA line orders**, **Repair orders**, **Recall orders**, **Reclamation requests**, **Resale orders**, and **Disposal orders**.
OT asset estate	View the asset functions and maintain accurate hardware and consumable records.	**Overview**, **All assets**, **All enterprise**, **Industrial**, **Hardware**, **Consumables**, and **Pallets**.
OT model management	View details of different types of OT models that are being managed.	**Overview**, **All models**, **All enterprise**, **Industrial**, **Hardware**, **Firmware**,**Firmware discovered**, and **Pallet**.
Procurement	View and manage details of all ongoing procurement activities.	**Overview**, **Requests**, **Request items**, **Purchase orders**, **Receiving slips**, **Advance shipment**, and **Catalog tasks**.
Contract and lease management	View and manage all asset contracts.	**Overview**, **All contracts**, **Lease contracts**, **Leased assets**, **Lease-end assets**, **Renewals**, **Renewal lines**, **My contracts**, **My contract tasks**, **My contract approvals**, and **Terms and conditions**.
Asset operations	View asset operations related to shipment, onboarding, move orders, and calculated model lifecycle.	**Shipment**, **Onboarding**, **Moves**, and **Calculated model lifecycle**.
Work management	Create and manage maintenance plans, work orders, and work order tasks.	**Overview**, **Calibrations**, **My work**, **Maintenance plans**, **Work orders**, **Work order tasks**, **Asset tasks**, **Work order templates**, **Checklist templates**, **My stockroom assets**, and **My asset pickup tasks**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name of the view	Description of the view	Tabs/lists in the view
OT model normalization	View information related to normalization of models.	**Overview**, **Custom OT model types**, **Custom OT product models**, **Custom OT model libraries**, **Custom firmware UNSPSC**, **Custom firmware products**, **Custom firmware versions**, and **Custom firmware CPE** **Note:** The **Custom firmware UNSPSC**, **Custom firmware products**, **Custom firmware versions**, and **Custom firmware CPE** tabs are available only in the OT Asset Workspace. For more information on these tabs, refer to the following topics: • Create a custom United Nations Standard Products and Services Code (UNSPSC) classification for firmware in your operational technology (OT) assets • Create a custom firmware product for your operational technology (OT) assets • Create a custom firmware version for your operational technology (OT) assets • Create a custom Common Platform Enumeration (CPE) mapping for firmware in your operational technology (OT) assets
Admin center	Perform configuration and administrative tasks related to TCO configuration.	**Model and asset tabs**, **Model categories**, **Model classifications**, **Stockroom types**, **Bulk import**, **Roles-to-class access**, **Workflow assignments**, **Calibration configuration**, **TCO configuration**, **Risk**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name of the view	Description of the view	Tabs/lists in the view
		configuration, **Other configuration**, **Shipping**, **Asset knowledge base**, and **Normalization opt-in**. As an OT asset manager and OT asset technician, you can only make changes to the Task rate card and Labor rate card options under the **TCO Configuration** list.

Hardware models and OT hardware assets in OT Asset Workspace

OT managers can create hardware models and OT hardware assets in the OT Asset Workspace. The **Hardware** tab in the OT model management and OT asset estate views lists the hardware models and OT hardware assets for all categories.

You can publish hardware models, more than once, to the enterprise catalog using the **Publish** button in the OT model management view. The **Publish** button appears only if there isn't already an active enterprise catalog item for that specific hardware model.

Note: Only the OT asset manager (sn_otam.ot_asset_manager) and the enterprise admin (sn_eam.enterprise_admin) can publish hardware models.

Hardware models and OT hardware assets are also integrated into the following Enterprise Asset Management flows:

- Asset request
- Asset refresh
- Stock order
- Single and multi-asset onboarding
- Return Merchandise Authorization (RMA)
- Repair
- Disposal
- Bulk import

Note:

Starting with the Zurich release, the bulk import templates include the **OT entity** and **Parent asset attribute** columns. When the OT Asset Management application is activated, you can bulk import hardware assets and models in both the Enterprise Asset Workspace and the OT Asset Workspace only if the OT entity column is marked as **TRUE**. With the **Parent asset attribute** field, you can choose to identify the parent of a child asset using either the Asset tag, Serial number, or MAC address.

To view instructions for bulk importing assets, select the Bulk import instructions icon on the contextual side bar.

- Asset reclamation

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: When a reclamation request for an OT hardware asset is created in the OT Asset Workspace, a hardware reclamation request line is generated and displayed in the **Hardware Asset Reclamation Lines** tab.

- Advanced shipment notification (ASN)

  Note: Starting with the Zurich release, the Download template for Advanced Shipment Notification includes the **OT entity** column. When this column is set to **TRUE** for hardware models, it creates OT hardware assets in the OT Asset Workspace.

- Asset audits
- Total Cost of Ownership (TCO) for enterprise assets

  Note: You can create a TCO report using a hardware model as a benchmark model, by selecting **Hardware** in the Report table field and then selecting the required hardware model in the **Benchmark model** field.

- Lease contract

  Note: The **Begin lease-end process** option is available if the contract includes OT hardware assets.

- Risk

  Note: The Enterprise asset risk heat map in the OT asset estate view and the Enterprise model risk heat map in the OT model management view also include hardware models with OT entity flag set to **TRUE**.

- Asset resale
- Loaner
- Move orders
- Recall
- Stock rule

  Note: The **OT stock rule** check box on the stock rule form indicates whether the stock rule was created in the OT Asset Workspace.

  This check box appears for all models in both the OT Asset Workspace and Enterprise Asset Workspace only when the OT Asset Management application is activated. However, only the OT asset manager can select or deselect this check box in the OT Asset Workspace.

  If you have activated the Hardware Asset Management application, the *com.sn_otam.enable_ot_stock_rule* asset property enables you to separate OT and non-OT hardware assets in stock rules and stock rule reports. If you set this property to **true** and select the **OT stock rule** check box, only OT hardware assets are included. If the **OT stock rule** check box isn't selected, only non-OT hardware will be included. By default, for existing stock rules, this property is set to **false**, and the OT stock rule is also set to **false**. This means that both OT and non-OT hardware assets are included in the stock rules and reports, regardless of the OT entity flag.

Furthermore, you can generate maintenance plans and work orders for OT hardware assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

All OT hardware assets are automatically tagged as an OT entity. When an OT hardware asset is sourced from an existing stockroom via a transfer order or from the local stockroom, the asset is automatically tagged as an OT entity. Similarly, during the receiving process of OT hardware assets procured via a purchase order, the asset is automatically tagged as an OT entity. The **OT entity** field appears in the Hardware asset form in OT asset estate view and is selected by default for all OT hardware assets.

You can evaluate how effectively your assets are functioning and being used through the reports based on asset key performance indicators in the **Asset performance** tab of the **Asset analytics** view. The asset performance report is also available on the contextual sidebar of the asset record, displayed by selecting the Asset availability and related KPIs icon .

You can receive assets from any workflow directly at the stockroom using the unified receiving functionality in the OT asset Asset Workspace. You can receive assets in any of the following ways:

- Receive a single asset
- Receive multiple assets in the shipments
- Import assets in bulk and receive them

You can also manage supply and demand in your stockrooms effectively with inventory demand reports. To view the reports, follow these steps

1. Navigate to the **Inventory** view.
2. Select the **All stockrooms** tab.
3. Select a stockroom for which you want to view the inventory reports.
4. Select the **Inventory insights** tab.

Consumables in OT Asset Workspace

Consumables can be created in the OT Asset Workspace for hardware models, OT hardware assets, and industrial assets.

- For hardware models: Create consumables while creating a hardware model by selecting **Create consumable asset** from the **Asset tracking strategy** drop-down. Once selected, all OT hardware assets for the given hardware model will be consumables. After a consumable is created, the following related lists appear in the hardware model form: Compatibles, Substitutes, Consumables, Vendor catalog items, Consumable model lifecycle, Skills, Knowledge, Application.
- For OT hardware assets: Create consumables from the Consumables tab in the OT asset estate view by selecting **Hardware asset** in the **Type** drop-down.
- For industrial assets: Create consumables from the Consumables tab in the OT asset estate view by selecting **Industrial asset** in the **Type** drop-down.

Any consumable model that you create in the OT Asset Workspace, has the consumable model category.

Related topics

OT Asset Workspace roles

Enterprise Asset Workspace

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

OT Asset Management licensing

The ServiceNow® platform uses a licensing method where your organization is charged for using the OT Asset Management application. In this licensing model, all assets of the Industrial and Hardware model categories are charged based on the Subscription unit ratio.

The ServiceNow® OT Asset Management licensing is based on resource categories. A resource category is a group of related model categories. The OT Asset Management application supports some default resource categories. These resource categories enable assets of the Industrial and Hardware model categories to use the features and workflows of the OT Asset Management application. Any asset of the Industrial and Hardware model category is counted toward a Subscription Unit based on the predefined ratio of number of assets to subscription units.

When you create a custom model category with a licensable Industrial or Hardware model category as its parent, the custom model category is automatically associated with the resource category of the parent model category. Based on the resource category, the assets of these custom model categories are licensed and counted toward a Subscription Unit.

Note: When the OT Asset Management application is activated on your ServiceNow instance, all the OT Asset Management license resource categories are opted in by default.

OT Asset Management license resource categories

Resource category	Subscription unit ratio	Model category
Unclassed OT	1:1	• Industrial • Industrial General
OT Supervisory System	1:1	• OT Supervisory • OT Supervisory EWS • OT Supervisory Historian • OT Supervisory HMI • OT Supervisory OPC • OT Supervisory SCADA
OT Control System	3:1	• OT Control • OT Control 3D Printer • OT Control CNC • OT Control DCS • OT Control DPU • OT Control IED • OT Control Module • OT Control PLC • OT Control RTU

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

OT Asset Management license resource categories (continued)

Resource category	Subscription unit ratio	Model category
		• OT Control SCADA • OT Control Server
OT Field Devices	10:1	• OT Field Actuator • OT Field Device • OT Field Drive • OT Field Robot • OT Field Sensor
Industrial Consumable	25:1	Any consumable asset created using any of the preceding model categories.
Operational Equipment	1:1	Not applicable
Hardware resource categories		
OT Servers	1:1	Any model category which contains **Server** in the name and belongs to the alm_asset or alm_hardware class. Examples: • AIX Server • ESX Server • HPUX Server • Linux Server • Netware Server • OS/X Server • Solaris Server • UNIX Server • Windows Server
OT Network Gear	5:1	• IP Router • IP Switch • Network Gear
OT Storage	3:1	Storage Device
OT End User Computers	4:1	Computer
OT Mobile Devices	10:1	Mobile Device
OT Monitors	15:1	Monitor

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

OT Asset Management license resource categories (continued)

Resource category	Subscription unit ratio	Model category
OT Printers	10:1	Printer
OT Unclassified Hardware	1:1	Hardware

The Subscription unit ratio is the ratio of the number of assets to the number of subscription units. For example, the subscription unit ratio of Industrial Consumable is 25:1, where 25 assets require a single unit of license. If 1 license costs $100, then 25 industrial consumable assets cost $100 and 50 industrial consumable assets cost $200.

You can view the subscription details of your OT Asset Management application using the ITAM License Report. For more details, see View the license report for the OT Asset Management application.

OT hardware assets in OT Asset Management licensing

The OT Asset Management licensing model includes a few default hardware resource categories to license OT hardware assets.

In the OT Asset Management licensing model, only hardware assets with the **OT entity** flag set to **true** are licensed and counted toward a Subscription unit under the hardware resource categories of OT Asset Management licensing. The OT Asset Management workflows support OT hardware assets.

Note: Non-OT Hardware assets with the **OT entity** flag set to **false** can't use the features and workflows of the OT Asset Management application even if you have installed the application. The non-OT hardware assets aren't licensed under OT Asset Management.

The Hardware Asset Management (HAM) licensing model includes default resource categories equivalent to the hardware resource categories of OT Asset Management.

Comparison of resource categories

OTAM hardware resource category	Equivalent HAM resource category
OT Servers	Servers
OT Network Gear	Network Gear
OT Storage	Storage
OT End User Computers	End User Computers
OT Mobile Devices	Mobile Devices
OT Monitors	Monitors
OT Printers	Printers
OT Unclassified hardware	Unclassified Hardware

When both OT Asset Management and Hardware Asset Management applications or licensed HAM solutions are activated, and HAM resource categories are opted in, consider the following points:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- OT hardware assets are licensed only under the hardware resource categories of OT Asset Management licensing.
- Non-OT hardware assets are licensed only under the resource categories of HAM licensing.
- OT Asset Management workflows support only OT hardware assets.
- HAM workflows support both OT hardware assets and non-OT hardware assets.

For more details on licensing hardware assets, see Licensing framework for Hardware Asset Management solutions.

View the license report for the OT Asset Management application

View details of the subscriptions consumed by your organization for the OT Asset Management application by using the ITAM License Report.

Before you begin

Role required: sn_eam.enterprise_admin

About this task

The EAM Populate Licensing Data job runs every Sunday and populates the ITAM License Report. Any changes to the license consumption will reflect on the ITAM license report only after the weekly license count calculation.

Procedure

1. Navigate to **All** > **ITAM Licensing** > **ITAM License Report**.
2. Search for the OT Asset Management application.



Application	Resource Category	Resource Subcategory	Resource Total Count	Subscription Unit Ratio	Total Subscription Units Consumed
OT Asset Management	Search	Search	Search	Search	Search
OT Asset Management	Operational Equipment		12	1:1	12
OT Asset Management	Industrial Consumable		128	25:1	6
OT Asset Management	Unclassed OT		0	1:1	0
OT Asset Management	OT Mobile Devices		0	10:1	0
OT Asset Management	OT Servers		0	1:1	0
OT Asset Management	OT End user computers		0	4:1	0
OT Asset Management	OT Control System		653	3:1	218
OT Asset Management	OT Supervisory System		4	1:1	4
OT Asset Management	OT Network gear		4	5:1	1
OT Asset Management	OT Unclassified hardware		0	1:1	0
OT Asset Management	OT Monitors		0	15:1	0
OT Asset Management	OT Printer		0	10:1	0
OT Asset Management	OT Storage		0	3:1	0
OT Asset Management	OT Field Devices		1,060	10:1	106

You can view the following information on subscriptions consumed for the resource categories for the OT Asset Management application.

- **Application**: Name of the application that is activated on your ServiceNow instance. The ITAM License Report can be grouped by the application.
- **Resource Category**: Managed OT resource types available for the OT Asset Management application. The resource types include the following:
  - Unclassed OT
  - OT Supervisory System
  - OT Control System
  - OT Field Devices
  - Industrial Consumable
  - Operational Equipment

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

    - OT Servers
    - OT Network Gear
    - OT Storage
    - OT End User Computers
    - OT Mobile Devices
    - OT Monitors
    - OT Printers
    - OT Unclassified Hardware
  - **Resource Subcategory**: Subcategories of a Resource category.
  - **Resource Total Count**: Asset count of the managed OT resources that is grouped by Resource categories and Model categories.
  - **Subscription Unit Ratio**: Predefined ratios that determine how many assets of a Resource category require a subscription. For example, the defined ratio of 25:1 for Industrial Consumable means that every 25 assets of that resource category require one Subscription Unit.
  - **Total Subscription Units Consumed**: The number of subscriptions per Resource category that your organization consumed. The licensing module calculates this number by applying the Subscription Unit Ratio to the Resource Total Count for each Resource Category.

Asset and Configuration Item (CI) synchronization for Operational Technology (OT) assets

Maintain synchronization between asset and CI for OT assets through MAC address on the asset and the Network Adapter CI.

Synchronization between asset and CI is achieved using the **Serial number** field. However, an OT asset need not necessarily have a serial number, but it's associated with a MAC address. Therefore, the asset-CI synchronization for OT assets includes the **MAC address** (mac_addr) field in the Asset [alm_asset] table in addition to the serial number.

A CI can have multiple MAC addresses. The Network Adapter [cmdb_ci_network_adapter] table stores all the MAC addresses and also has a reference field to the CI [cmdb_ci] table. Therefore, the relationship between MAC address and CI is maintained.

Synchronization from asset to CI

When an asset is created with a MAC address, synchronization happens as follows:

1. A CI is created.
2. A record for the corresponding MAC address is created in the Network Adapter [cmdb_ci_network_adapter] table with a reference to the CI.

When the MAC address of an asset is updated, the existing record in the Network Adapter [cmdb_ci_network_adapter] table isn't updated. Instead, a new record is created in the Network Adapter [cmdb_ci_network_adapter] table.

Synchronization from CI to asset

When a CI is created with a MAC address, synchronization happens as follows:

1. An asset is created.
2. The MAC address of the CI is copied to the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If there's an existing CI, then the associated asset is updated with the MAC address only if the asset doesn't have it already.

Rules for generating CI names

A CI name follows a format that's based on the following conditions:

Conditions and CI name

Condition	CI name format
Asset has a Serial number	Concatenation of Serial number and Model name separated by hyphen. For example, SN123 - DemoModel.
Asset has a Serial number and a MAC address	Concatenation of Serial number and Model name separated by hyphen. For example, SN123 - DemoModel.
Asset has no Serial number but has a MAC address	Concatenation of MAC address and Model name separated by hyphen. For example, 88-22-33-66-888-AB - DemoModel.
Asset has no Serial number and MAC address	Model name

Whenever there are updates to **Serial number** or **MAC address** fields, the CI name is synchronized only under the following conditions:

- CI name isn't updated manually.
- The Discovery source is *SNassetmanagement*, which means that the CI is created from an asset.
- CI name hasn't been modified by CMDB.

Note: The *sn_itam_common.mac_address_sync* system property enables you to synchronize asset and CI using the Mac address. By default, this system property is set to **false**. To enable synchronization through the Mac address, set this system property to **true** by navigating to **Enterprise Asset Workspace** > **Admin center** > **Other configuration**.

OT entity synchronization between asset and CI

The CI [cmdb_ci] table has the **OT entity** [cmdb_ot_entity] field. Also, the Asset [alm_asset] has a corresponding **OT entity** [ot_entity] field. Synchronization of the OT entity happens as follows:

- When a CI is created with the OT entity reference set on the CI, the **OT entity** [ot_entity] field in the Asset [alm_asset] table is set to **true**.
- When an asset with the OT entity set to **true** is created, a corresponding CI and an OT entity are created on the CMDB side. The OT entity reference is then set on the CI.

Important: After a CI is marked as an OT entity, it can't be reverted to a non-OT entity.

Enterprise Asset Management for Data Center and Network Asset Management (DCNAM)

Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) is a licensable application that enables you to manage the life cycles of your mission-critical facility-based enterprise assets and linear assets for telecommunications networks.

The Enterprise Asset Management for DCNAM (com.sn_eam_dcnam) application is a specialized offering within the suite of Enterprise Asset Management solutions. The application provides the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

functionalities, features, and workflows of Enterprise Asset Management but for mission-critical facility-based enterprise assets and linear assets only.

When you install the application on a ServiceNow instance, the Enterprise Asset Management application is also installed automatically. For more information on installing the application, see Install Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) from the ServiceNow Store.

Installing Enterprise Asset Management for Data Center and Network Asset Management (DCNAM)

Install the Enterprise Asset Management for DCNAM application so that you can manage the life cycles of your mission-critical facility-based enterprise assets. You can install the application from either the ServiceNow® Store or the Admin Home page.

Install Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) from the ServiceNow® Store

You can install the Enterprise Asset Management for DCNAM application (com.sn_eam_dcnam) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

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

Role required: admin

About this task

The following items are installed with Enterprise Asset Management for DCNAM:

- Plugins
- Store applications
- Roles

For more information, see Components installed with Enterprise Asset Management for Data Center and Network Asset Management (DCNAM).

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Enterprise Asset Management for DCNAM application (com.sn_eam_dcnam) using the filter criteria and search bar.

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

   A list of the versions available to you 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.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

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

Install Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) from the Admin Home page

You can install the Enterprise Asset Management for DCNAM application (com.sn_eam_dcnam) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

The following items are installed with Enterprise Asset Management for DCNAM:

- Plugins
- Store applications
- Roles

For more information, see Components installed with Enterprise Asset Management for Data Center and Network Asset Management (DCNAM).

Procedure

1. Open the Admin Home page.
   The Admin Home page is the first page that opens when you log in to your ServiceNow instance. To navigate back to the Admin Home page from any other page, use one of the following options:
   - From the header of your ServiceNow instance, navigate to **Admin** > **Admin Home**. The Admin Home page launches in a new browser tab.
   - On the header of your ServiceNow instance, select the ServiceNow logo.
2. In the Manage your products section of the Admin Home page, select **View product overview** on the **Enterprise Asset Management for DCNAM** card.

   Note: The Admin Home page displays cards for only the applications that you're entitled to.

   The Product Hub opens.
3. In the Apps and plugins section of the Product Hub, select the **Not installed** tab.
4. Locate the **Enterprise Asset Management for DCNAM** card and then select the installation icon.

Result

After the application is installed successfully, the card moves from the **Not installed** tab to the **Installed** tab. You can view additional details about the application, including the application version, release compatibility, and dependencies, by selecting the Open Application Manager icon on the card.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Components installed with Enterprise Asset Management for Data Center and Network Asset Management (DCNAM)

Several types of components are installed with activation of the com.sn_eam_dcnam plugin, including user roles and applications.

Roles installed

Role title [name]	Description	Contains roles
DCNAM asset manager [sn_eam_dcnam.dcnam_asset_manager]	Manages critical facility-based enterprise models and assets for telecommunications networks. In addition, manages linear assets for telecommunications networks.	sn_eam.enterprise_asset_manager
DCNAM asset technician [sn_eam_dcnam.dcnam_asset_technician]	Performs asset and work tasks related to critical facility-based enterprise assets and linear assets for telecommunications networks.	sn_eam.enterprise_asset_technician

Applications installed

Name	Description
ServiceNow Enterprise Asset Management (com.sn_eam)	Manages the complete life cycles of your enterprise connected and non-connected assets. For details on the components that are installed with the Enterprise Asset Management application, see Components installed with Enterprise Asset Management.

Critical Environment Asset Workspace

The Critical Environment Asset Workspace is the intuitive and streamlined user interface of the Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) application.

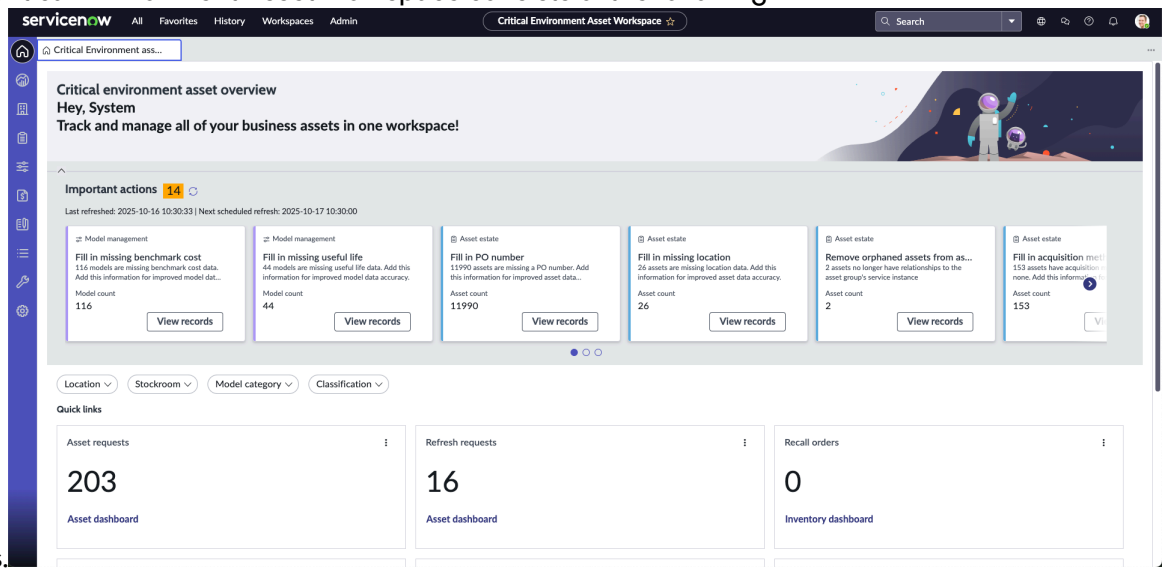
Critical Environment Asset Workspace landscape

The Critical Environment Asset Workspace is a unified medium with multiple views. These views give you comprehensive visibility into your mission-critical facility-based enterprise assets and linear assets so that you can manage them effectively throughout their life cycles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Critical Environment Asset Workspace views

The Critical Environment Asset Workspace consists of the following views.



Critical Environment Asset Workspace views

View	Description	Available tabs or lists
Critical Environment asset overview	View important actions and quick links for active tasks.	None
Asset analytics	Track the Total Cost of Ownership (TCO) and overall performance of your facility-based enterprise assets and linear assets.	• **Overview** • **Asset TCO** • **Asset performance** • **Data Visualizations**
Inventory	View and manage the inventory and stockrooms for your facility-based enterprise assets and linear assets.	• **Overview** • **All stockrooms** • **Stock rules** • **Transfer orders** • **Asset audits** • **Loaner asset orders** • **RMA orders** • **RMA order lines** • **Repair orders** • **Recall orders** • **Reclamation requests**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Critical Environment Asset Workspace views (continued)

View	Description	Available tabs or lists
		• **Resale orders** • **Disposal orders**
Critical Environment asset estate	View, create, and manage facility-based enterprise assets and linear assets.	• **Overview** • **Asset indoor map** **Note:** This tab appears only under the following conditions: ○ You've installed the Indoor Mapping for Assets application on your ServiceNow instance. ○ You've configured the option to display the tab. For more information, see Track assets using indoor maps in the Enterprise Asset Workspace. • **Asset groups** • **Linear assets** • **All assets** • **All enterprise** • **Facility** • **Consumable**
Critical Environment model management	View, create, and manage facility-based enterprise models.	• **Overview** • **All models** • **All enterprise** • **Facility**
Procurement	View and manage all procurement details and activities, including procurement requests and sourcing tasks.	• **Overview** • **Requests** • **Requested items** • **Purchase orders** • **Receiving slips** • **Advance shipment** • **Catalog tasks**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Critical Environment Asset Workspace views (continued)

View	Description	Available tabs or lists
Contract and lease management	View, create, and manage contracts for your facility-based enterprise assets and linear assets.	• **Overview** • **All contracts** • **Lease contracts** • **Leased assets** • **Lease-end assets** • **Renewals** • **Renewal lines** • **My contracts** • **My contract tasks** • **My contract approvals** • **Terms and conditions**
Asset operations	Track and manage shipments, stockroom receiving, onboarding, move orders, and calculated model life-cycle templates. If you have installed the Enterprise Asset Management for Providers application on your ServiceNow instance, you can also track and manage provider-based RMA response orders and inbound asset orders for Device as a Service (DaaS) assets.	• **Provider** **Note:** This tab appears only if you've installed the Enterprise Asset Management for Providers application on your ServiceNow instance. For more information on this application, see Enterprise Asset Management for Providers. • **Shipment** • **Stockroom receiving** • **Onboarding** • **Moves** • **Calculated model lifecycle**
Work management	Create and manage maintenance plans, work orders, and work order tasks.	• **Overview** • **Calibrations and conditions** • **My Work** • **Maintenance plans** • **Work orders** • **Work order tasks** • **Asset tasks** • **Work order templates** • **Checklist templates**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Critical Environment Asset Workspace views (continued)

View	Description	Available tabs or lists
		• **My stockroom assets** • **My asset pickup tasks**
Admin center	Perform configuration and administrative tasks, including bulk imports and model category creation.	• **Model and asset tabs** • **Model categories** • **Model classifications** • **Failure and resolution** • **Site configuration** • **Linear asset types** • **Stockroom types** • **Bulk import** • **Roles-to-class access** • **Workflow assignments** • **Calibration configuration** • **Asset condition configuration** • **TCO configuration** • **KPI configuration** • **Risk configuration** • **Other configurations** • **Shipping** • **Asset knowledge base** • **Normalization opt-in** • **Product catalog** • **Reference lists**

Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) licensing

The Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) application supports a unit-based subscription licensing model in which you must pay a recurring fee for assets to use the application. You can determine the licensing requirements and costs for these assets based on their resource categories and corresponding subscription unit ratios.

Resource categories group specific types of assets together and enable them to use the features and workflows of an application. Each resource category is associated with a corresponding subscription unit ratio, which you can use to group the given assets against a standardized cost. You can use this information to determine the total licensing requirements and costs for assets within each resource category. For example, a ratio of 25:1 indicates that one subscription is required for every 25 assets within a given resource category. If one subscription costs $100 and

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

you have 50 assets within that resource category, you must purchase two subscriptions for a total of $200.

The Enterprise Asset Management for DCNAM application supports the following resource categories.

Note: These resource categories are automatically enabled when you activate the Enterprise Asset Management for DCNAM application on your ServiceNow instance.

Enterprise Asset Management for DCNAM resource categories

Resource category	Subscription unit ratio	Supported asset model categories
Critical environment asset	10:1	This resource category supports assets that are associated with the following model categories: • Automatic Transfer Switch • AV Displays • AV Equipment • Cameras • Circuit Breaker • Electrical • Facility General • Fuel Tank • Fuse Alarm Panel • HVAC • Inverter • Maintenance Bypass Panel • Plumbing • Power Generator • Power Panel • Rectifier • Remote Power Panel • Security • Service Industry Equipment • Structure • Switchgear • Transformer • UPS • Facilities
Linear asset	2:1	N/A
Linear asset segment	4:1	N/A

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: These resource categories support serialized assets only. You are not charged for any consumable assets.

You can view subscription consumption information for the Enterprise Asset Management for DCNAM application by using the ITAM Licensing Resource Counts [itam_licensing_resource_counts] table. For more details, see View your subscription consumption for the Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) application.

View your subscription consumption for the Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) application

Use the ITAM Licensing Resource Counts [itam_licensing_resource_counts] table to gain insight into your subscription consumption for the Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) application.

Before you begin

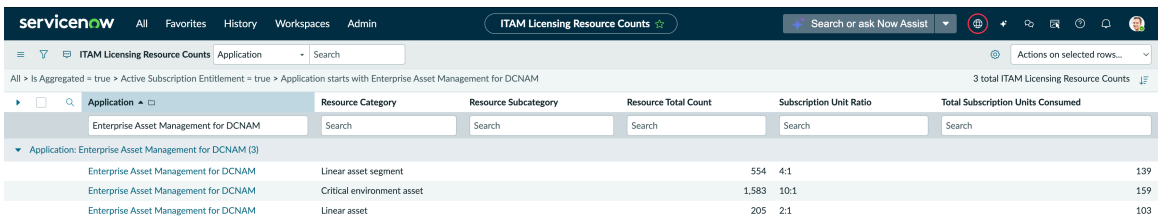
Role required: sn_eam.enterprise_admin

About this task

The EAM Populate Licensing Data scheduled job runs daily to generate subscription consumption information for the application. Any changes to your subscription consumption are reflected only after the next scheduled job runs.

Procedure

1. On the page header of your ServiceNow instance, select **All**.
2. In the menu navigation filter, enter `itam_licensing_resource_counts_list.do`. The ITAM Licensing Resource Counts [itam_licensing_resource_counts] table opens.
3. In the table, locate all entries for the Enterprise Asset Management for DCNAM application.



If the table includes multiple applications, you can locate all entries for the Enterprise Asset Management for DCNAM application by using any of the following options:

- If you want to sort the table by application, use the following steps:

  a. Select the Column options icon next to the Application column name.

  Alternatively, right-click the Application column name.

  b. Select an option to sort the applications in either ascending or descending alphabetical order.

  - To sort the applications in ascending alphabetical order, select **Sort (a to z)**.
  - To sort the applications in descending alphabetical order, select **Sort (z to a)**.

  You can then locate all entries for the Enterprise Asset Management for DCNAM application.

- If you want to group the table by application, use the following steps:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select the Column options icon next to the Application column name.

Alternatively, right-click the Application column name.

b. Select **Group By Application**.
You can then expand the **Application: Enterprise Asset Management for DCNAM** group to view all entries for the application.

- If you want the table to display only the Enterprise Asset Management for DCNAM application, use the following steps:

a. On the table header, set the search filter to **Application**.

b. In the corresponding search box, enter `Enterprise Asset Management for DCNAM`.

c. Press the Enter key.

Alternatively, you can right-click the Enterprise Asset Management for DCNAM application name in the table and then select **Show Matching**.

4. View the following subscription consumption information for the application.

Note: Subscription consumption information is generated and grouped by resource category. For more information on resource categories, see Enterprise Asset Management for Data Center and Network Asset Management (DCNAM) licensing.

Subscription consumption information

Field	Description
Application	Name of the application.
Resource Category	Resource category that is supported by the application.
Resource Subcategory	Subcategory of the given resource category.
Resource Total Count	Total number of assets within the given resource category and subcategory.
Subscription Unit Ratio	Predefined ratio that indicates how many assets within the given resource category require a subscription. For example, a ratio of 25:1 indicates that one subscription is required for every 25 assets within the resource category.
Total Subscription Units Consumed	Total number of subscriptions that you have consumed for the given resource category and subcategory. The ITAM licensing module calculates this value by applying the Subscription Unit Ratio to the Resource Total Count.

Enterprise Asset Management for Providers

Enterprise Asset Management for Providers is a licensable application that enables Device as a Service (DaaS) providers, vendors, and manufacturers to manage all DaaS-related activities, including the fulfillment of Return Merchandise Authorization (RMA) requests, from a single location.

The Enterprise Asset Management for Providers (com.sn_eam_provider) application is a specialized offering within the suite of Enterprise Asset Management solutions. The application

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

adds DaaS provider-based functionalities and workflows to the Enterprise Asset Management application, including the capabilities to create and manage provider-based RMA response orders and inbound asset orders.

You can install and use the application only if you've already installed the Enterprise Asset Management (com.sn_eam) application or one of the following Enterprise Asset Management-dependent applications on your ServiceNow instance:

- OT Asset Management (com.sn_otam)
- Enterprise Asset Management for Healthcare (com.sn_eamhc)
- Enterprise Asset Management for Facilities (com.sn_eamfam)
- Enterprise Asset Management for Data Center and Network Asset Management (com.sn_eam_dcnam)

Installing Enterprise Asset Management for Providers

Install the Enterprise Asset Management for Providers application so that Device as a Service (DaaS) providers, vendors, and manufacturers can manage all DaaS-related activities from a single location. You can install the application from either the ServiceNow® Store or the Admin Home page.

Install Enterprise Asset Management for Providers from the ServiceNow® Store

You can install the Enterprise Asset Management for Providers application (com.sn_eam_provider) if you have the admin role. The application installs related ServiceNow® Store applications if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Enterprise Asset Management for Providers application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Install the Enterprise Asset Management application (com.sn_eam) or one of the following Enterprise Asset Management-dependent applications on your ServiceNow instance:

  Note: For instructions on how to install the Enterprise Asset Management application, see Installing Enterprise Asset Management.

  - OT Asset Management (com.sn_otam)

    For instructions on how to install this application, see Installing OT Asset Management.

  - Enterprise Asset Management for Healthcare (com.sn_eamhc)

    For instructions on how to install this application, see Installing Enterprise Asset Management for Healthcare.

  - Enterprise Asset Management for Facilities (com.sn_eamfam)
  - Enterprise Asset Management for Data Center and Network Asset Management (com.sn_eam_dcnam)

    For instructions on how to install this application, see Installing Enterprise Asset Management for Data Center and Network Asset Management (DCNAM).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role required: admin

About this task

The following items are installed with Enterprise Asset Management for Providers:

- Roles
- Store applications
- Tables

For more information, see Components installed with Enterprise Asset Management for Providers.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Enterprise Asset Management for Providers application (com.sn_eam_provider) using the filter criteria and search bar.

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

   A list of the versions available to you 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**.

Install Enterprise Asset Management for Providers from the Admin Home page

You can install the Enterprise Asset Management for Providers application (com.sn_eam_provider) if you have the admin role. The application installs related ServiceNow® Store applications if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Install the Enterprise Asset Management application (com.sn_eam) or one of the following Enterprise Asset Management-dependent applications on your ServiceNow instance:

  Note: For instructions on how to install the Enterprise Asset Management application, see Installing Enterprise Asset Management.

  - OT Asset Management (com.sn_otam)

    For instructions on how to install this application, see Installing OT Asset Management.
  - Enterprise Asset Management for Healthcare (com.sn_eamhc)

    For instructions on how to install this application, see Installing Enterprise Asset Management for Healthcare.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Enterprise Asset Management for Facilities (com.sn_eamfam)
- Enterprise Asset Management for Data Center and Network Asset Management (com.sn_eam_dcnam)

  For instructions on how to install this application, see Installing Enterprise Asset Management for Data Center and Network Asset Management (DCNAM).

Role required: admin

About this task

The following items are installed with Enterprise Asset Management for Providers:

- Roles
- Store applications
- Tables

For more information, see Components installed with Enterprise Asset Management for Providers.

Procedure

1. Open the Admin Home page.
   The Admin Home page is the first page that opens when you log in to your ServiceNow instance. To navigate back to the Admin Home page from any other page, use one of the following options:
   - From the header of your ServiceNow instance, navigate to **Admin** > **Admin Home**. The Admin Home page launches in a new browser tab.
   - On the header of your ServiceNow instance, select the ServiceNow logo.
2. In the Manage your products section of the Admin Home page, select **View product overview** on the relevant Enterprise Asset Management card.

   Note: The Admin Home page displays cards for only the applications that you're entitled to.

   The Product Hub opens.
3. In the Apps and plugins section of the Product Hub, select the **Not installed** tab.
4. Locate the **Enterprise Asset Management for Providers** card and then select the installation icon .

Result

After the application is installed successfully, the card moves from the **Not installed** tab to the **Installed** tab. You can view additional details about the application, including the application version, release compatibility, and dependencies, by selecting the Open Application Manager icon on the card.

Components installed with Enterprise Asset Management for Providers

Several types of components are installed with activation of the com.sn_eam_provider plugin, including user roles, applications, and tables.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles installed

Role title [name]	Description	Contains roles
Provider asset manager [sn_eam_provider.provider_asset_manager]	Manages all DaaS-related activities, including the fulfillment of Return Merchandise Authorization (RMA) requests.	• sn_eam.asset_manager • sn_eam_provider.provider_asset_technician
Provider asset technician [sn_eam_provider.provider_asset_technician]	Performs tasks related to DaaS assets.	sn_eam.asset_technician

Applications installed

Name	Description
ITAM Common forDaaS (sn_daas_common)	Provides asset management services to DaaS providers, vendors, and manufacturers to support their DaaS offerings.

Tables installed

Table	Description
RMA response [sn_daas_common_rma_response_order]	Information about your RMA response orders, including the originating account and the delivery address.
RMA response order line [sn_daas_common_rma_response_orderline]	Information about each asset that is associated with your RMA response orders, including the model of the asset.
Inbound asset order [sn_itam_common_inbound_asset_order]	Information about your inbound asset orders, including the originating account and the delivery address.
Inbound asset order line [sn_itam_common_inbound_asset_orderline]	Information about each asset that is associated with your inbound asset orders, including the model of the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Managing Return Merchandise Authorization (RMA) response orders for defective Device as a Service (DaaS) assets

If you are a DaaS provider, vendor, or manufacturer, you can fulfill RMA requests from your customers by creating and managing provider-based RMA response orders.

To successfully fulfill an RMA request, you must perform the following tasks in the RMA response order workflow:

1. Create an RMA response order
2. Create corresponding RMA response order lines
3. Complete the RMA response order

Create a Return Merchandise Authorization (RMA) response order for defective Device as a Service (DaaS) assets

Create an RMA response order to track and manage the process of repairing or replacing the defective DaaS assets that are associated with an RMA request.

Before you begin

Role required: sn_eam_provider.provider_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**.
3. Select **New**.
4. On the form, fill in the fields.

Create New RMA response form

Fields	Description
External RMA number	Customer-provided reference number for the RMA request that you want to fulfill. You can use this reference number to track the source of the RMA response order.
DaaS account	DaaS account of the customer who submitted the RMA request. You can use this information to determine which assets are leased to the account.
Contact Email	Email address of the customer who submitted the RMA request.
Delivery address	Address of the customer who submitted the RMA request.
Requested for	Name of the customer who submitted the RMA request.
Customer mobile number	Mobile phone number of the customer who submitted the RMA request.
Device location	Geographic location of the assets that are associated with the RMA request.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Fields	Description
RMA justification	Customer-provided justification for the RMA request.

5. Select **Save**.

What to do next

Create corresponding RMA response order lines for the DaaS assets that you want to repair or replace. For detailed instructions, see Create a Return Merchandise Authorization (RMA) response order line for a defective Device as a Service (DaaS) asset.

Create a Return Merchandise Authorization (RMA) response order line for a defective Device as a Service (DaaS) asset

Create an RMA response order line for each defective DaaS asset that you want to repair or replace through an RMA response order. Use each order line to track and manage the tasks that you must complete to repair or replace the given asset.

Before you begin

Role required: sn_eam_provider.provider_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the RMA response order lines list.

Navigation option	Procedure
Provider RMA response order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**. **b.** From the list of available RMA response orders, select the order that you want to create an RMA response order line for. **c.** On the RMA response order record, select the **RMA response order lines** tab.
Provider RMA response order line	From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order line**.

3. Select **New**.
4. On the form, fill in the fields.

Create New RMA response order line form

Field	Description
Model	Model of the asset that you want to repair or replace.
Assigned to	User who is assigned to repair or replace the specified asset.
Asset	Asset that you want to repair or replace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: The list of available assets is automatically filtered to display only the assets that meet the following criteria: ○ The asset is associated with the model specified in the **Model** field. ○ The **DaaS asset** option is enabled on the corresponding asset record. ○ The **DaaS account** field on the corresponding asset record matches the DaaS account specified in the associated RMA response order.

5. Select **Save**.

Result

- The RMA response order line is added to the associated RMA response order.
- An RMA assessment task is automatically generated for the RMA response order line.

What to do next

Perform all tasks that are required for completing the RMA response order line so that you can complete and close the associated RMA response order. For detailed instructions, see Completing a Return Merchandise Authorization (RMA) response order for defective Device as a Service (DaaS) assets.

Completing a Return Merchandise Authorization (RMA) response order for defective Device as a Service (DaaS) assets

After you create an RMA response order with corresponding RMA response order lines, you must perform various tasks to complete and close the order.

Based on the action that you want to take on your defective DaaS assets, you must complete a specific set of tasks for each RMA response order line within an RMA response order. After you complete all tasks for an order line, it moves to the Completed stage. After every order line reaches the Completed stage, the order is closed.

Tasks for supported RMA actions

Supported RMA action	Tasks
On-site repair	**1.** RMA assessment task to assess the defective DaaS asset. **2.** Schedule task to schedule a visit to the customer site. **3.** Evaluate RMA asset task to evaluate the defective DaaS asset. **4.** Repair asset task to repair the defective DaaS asset. **5.** Evaluate asset task to evaluate the repaired DaaS asset. **6.** The customer redeploys or disposes of the repaired DaaS asset.
On-site replacement	**1.** RMA assessment task to assess the defective DaaS asset. **2.** Schedule task to schedule a visit to the customer site. **3.** Evaluate RMA asset task to evaluate the defective DaaS asset. **4.** Ship task to have the customer ship the defective DaaS asset to you.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Tasks for supported RMA actions (continued)

Supported RMA action	Tasks
	5. Receive asset task to verify that you received the defective DaaS asset from the customer. 6. Complete an inbound asset order to provide the customer with a new DaaS asset.
Off-site repair	1. RMA assessment task to assess the defective DaaS asset. 2. Ship task to have the customer ship the defective DaaS asset to you. 3. Receive asset task to verify that you received the defective DaaS asset from the customer. 4. Evaluate RMA asset task to evaluate the defective DaaS asset. 5. Repair asset task to repair the defective DaaS asset. 6. Evaluate asset task to evaluate the repaired DaaS asset. 7. Ship task to ship the repaired DaaS asset back to the customer. 8. Receive asset task to verify that the customer received the repaired DaaS asset. 9. The customer redeploys or disposes of the repaired DaaS asset.
Off-site replacement	1. RMA assessment task to assess the defective DaaS asset. 2. Ship task to have the customer ship the defective DaaS asset to you. 3. Receive asset task to verify that you received the defective DaaS asset from the customer. 4. Evaluate RMA asset task to evaluate the defective DaaS asset. 5. Complete an inbound asset order to provide the customer with a new DaaS asset.

Complete the RMA assessment task for a defective Device as a Service DaaS asset

Complete the RMA assessment task for a defective DaaS asset by assessing the asset and determining the action that you want to take on it. You can choose to repair it, replace it, or reject the associated RMA request.

Before you begin

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
Provider RMA response order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**. **b.** From the list of available RMA response orders, select the order that you want to complete. **c.** On the RMA response order record, select the **RMA response order lines** tab. **d.** From the list of available RMA response order lines, select the order line that you want to assess the asset for. **e.** On the RMA response order line record, select the **Asset tasks** tab.
Provider RMA response order line	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order line**. **b.** From the list of available RMA response order lines, select the order line that you want to assess the asset for. **c.** On the RMA response order line record, select the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider asset tasks**.

3. From the list of available tasks, select the task number for the RMA assessment task that you want to complete.
4. On the **Details** tab of the RMA assessment task, fill in the fields.

Details tab

Field	Description
Assessment action	Action that you want to take on the asset. Select one of the following options: ○ **On site**: Option to repair or replace the asset at the customer site. ○ **Off site**: Option to repair or replace the asset at your organization's site. ○ **Denied**: Option to reject the RMA request.
Assignment group	Group that the task is assigned to.
Work notes	Notes about the task that are visible to all users within your organization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select **Close Task**.

> **Note:** If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The RMA assessment task closes with an updated state of Closed Complete.
- If you set the **Assessment action** field to **On site**, a corresponding Schedule task is automatically generated.
- If you set the **Assessment action** field to **Off site**, a corresponding Ship task is automatically generated.
- If you set the **Assessment action** field to **Denied**, the associated RMA response order line moves to the Rejected stage.

What to do next

- If you set the **Assessment action** field to **On site**, complete the corresponding Schedule task by scheduling a visit to the customer site. For detailed instructions, see Complete the Schedule task for a defective Device as a Service DaaS asset.
- If you set the **Assessment action** field to **Off site**, complete the corresponding Ship task by having the customer ship the asset to you. For detailed instructions, see Complete the Ship task for a defective Device as a Service DaaS asset.

Complete the Schedule task for a defective Device as a Service DaaS asset

If you want to perform an on-site repair or replacement for a defective DaaS asset, complete the Schedule task for the asset by scheduling a visit to the customer site.

Before you begin

Before you can begin the Schedule task, you must complete the preceding RMA assessment task by assessing the asset and selecting the option to perform an on-site repair or replacement. For detailed instructions, see Complete the RMA assessment task for a defective Device as a Service DaaS asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider RMA response order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**. **b.** From the list of available RMA response orders, select the order that you want to complete. **c.** On the RMA response order record, select the **RMA response order lines** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
	d. From the list of available RMA response order lines, select the order line that you want to schedule a customer site visit for. **Note:** You must select an order line that you have already completed the RMA assessment task for. **e.** On the RMA response order line record, select the **Asset tasks** tab.
Provider RMA response order line	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order line**. **b.** From the list of available RMA response order lines, select the order line that you want to schedule a customer site visit for. **Note:** You must select an order line that you have already completed the RMA assessment task for. **c.** On the RMA response order line record, select the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider asset tasks**.

3. From the list of available tasks, select the task number for the Schedule task that you want to complete.
4. On the **Details** tab of the Schedule task, fill in the fields.

Details tab

Field	Description
Due date	Date and time at which you must complete the task.
Scheduled date	Date and time at which you plan to visit the customer site.
Assignment group	Group that the task is assigned to.
Assigned to	User who the task is assigned to.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

Note: If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The Schedule task closes with an updated state of Closed Complete.
- A corresponding Evaluate RMA asset task is automatically generated.

What to do next

Complete the corresponding Evaluate RMA asset task by going to the customer site and evaluating the asset. For detailed instructions, see Complete the Evaluate RMA asset task for a defective Device as a Service DaaS asset.

Complete the Evaluate RMA asset task for a defective Device as a Service DaaS asset

Complete the Evaluate RMA asset task for a defective DaaS asset by evaluating the asset and determining whether you want to repair or replace it.

Before you begin

Before you can begin the Evaluate RMA asset task, you must complete the preceding task.

- If you are performing an on-site repair or replacement, you must complete the preceding Schedule task by scheduling a visit to the customer site. For detailed instructions, see Complete the Schedule task for a defective Device as a Service DaaS asset.
- If you are performing an off-site repair or replacement, you must complete the preceding Ship task by having the customer ship the asset to you. For detailed instructions, see Complete the Receive asset task for a defective Device as a Service DaaS asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider RMA response order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**. **b.** From the list of available RMA response orders, select the order that you want to complete. **c.** On the RMA response order record, select the **RMA response order lines** tab. **d.** From the list of available RMA response order lines, select the order line that you want to evaluate the asset for.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
	Note: If you are performing an on-site repair, you must select an order line that you have already completed the Schedule task for. If you are per forming an off-site repair or replace ment, you must select an order line that you have already completed the Receive asset task for. **e.** On the RMA response order line record, se lect the **Asset tasks** tab.
Provider RMA response order line	**a.** From the navigation menu of the Asset oper ations view, navigate to **Provider** > **Provider RMA response order line**. **b.** From the list of available RMA response or der lines, select the order line that you want to evaluate the asset for. **Note:** If you are performing an on-site repair, you must select an order line that you have already completed the Schedule task for. If you are per forming an off-site repair or replace ment, you must select an order line that you have already completed the Receive asset task for. **c.** On the RMA response order line record, se lect the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset opera tions view, navigate to **Provider** > **Provider as set tasks**.

3. From the list of available tasks, select the task number for the Evaluate RMA asset task that you want to complete.
4. On the **Details** tab of the Evaluate RMA asset task, fill in the fields.

Details tab

Field	Description
Assignment group	Group that the task is assigned to.
Evaluation result	Result of the evaluation. Select one of the following options: ○ **Repairable**: The asset can be repaired. ○ **Replace**: The asset is unrepairable and must be replaced.
Issue identified	Reason that the asset is defective.
Work notes	Notes about the task that are visible to all users within your organization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select **Close Task**.

> **Note:** If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The Evaluate RMA asset task closes with an updated state of Closed Complete.
- If you set the **Evaluation result** field to **Repairable**, a corresponding Repair asset task is automatically generated for both on-site and off-site repairs.
- If you set the **Evaluation result** field to **Replace** and you are performing an on-site replacement, a corresponding Ship task is automatically generated.
- If you set the **Evaluation result** field to **Replace** and you are performing an off-site replacement, a corresponding inbound asset order is automatically created.

What to do next

- If you set the **Evaluation result** field to **Repairable**, complete the corresponding Repair asset task by repairing the asset. For detailed instructions, see Complete the Repair asset task for a defective Device as a Service DaaS asset.
- If you set the **Evaluation result** field to **Replace** and you are performing an on-site replacement, complete the corresponding Ship task by shipping the asset to your organization. For detailed instructions, see Complete the Ship task for a defective Device as a Service DaaS asset.
- If you set the **Evaluation result** field to **Replace** and you are performing an off-site replacement, complete the corresponding inbound asset order to provide the customer with a new asset. For detailed instructions, see Completing an inbound asset order for requested Device as a Service (DaaS) assets.

Complete the Repair asset task for a defective Device as a Service DaaS asset

Complete the Repair asset task for a defective DaaS asset by repairing the asset either on-site or off-site.

Before you begin

Before you can begin the Repair asset task, you must complete the preceding Evaluate RMA asset task by evaluating the asset and indicating that it is repairable. For detailed instructions, see Complete the Evaluate RMA asset task for a defective Device as a Service DaaS asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider RMA response order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**. **b.** From the list of available RMA response orders, select the order that you want to complete.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
	c. On the RMA response order record, select the **RMA response order lines** tab. **d.** From the list of available RMA response or der lines, select the order line that you want to repair the asset for. **Note:** You must select an order line that you have already completed the Evaluate RMA asset task for. **e.** On the RMA response order line record, se lect the **Asset tasks** tab.
Provider RMA response order line	**a.** From the navigation menu of the Asset oper ations view, navigate to **Provider** > **Provider RMA response order line**. **b.** From the list of available RMA response or der lines, select the order line that you want to repair the asset for. **Note:** You must select an order line that you have already completed the Evaluate RMA asset task for. **c.** On the RMA response order line record, se lect the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset opera tions view, navigate to **Provider** > **Provider as set tasks**.

3. From the list of available tasks, select the task number for the Repair asset task that you want to complete.
4. On the **Details** tab of the Repair asset task, fill in the fields.

Details tab

Field	Description
Assignment group	Group that the task is assigned to.
Repair result	Result of the repair. Select one of the following options: ○ **Repaired**: The asset was repaired. ○ **Unrepairable**: The asset is unrepairable and must be replaced.
Issue identified	Reason that the asset is unrepairable. Fill in this field only if you set the **Repair result** field to **Unrepairable**.
Work notes	Notes about the task that are visible to all users within your organization.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select **Close Task**.

> **Note:** If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The Repair asset task closes with an updated state of Closed Complete.
- If you set the **Repair result** field to **Repaired**, a corresponding Evaluate asset task is automatically generated.
- If you set the **Repair result** field to **Unrepairable**, a corresponding Ship task is automatically generated.

What to do next

- If you set the **Repair result** field to **Repaired**, complete the corresponding Evaluate asset task by evaluating the repaired asset and determining if it can be redeployed. For detailed instructions, see Complete the Evaluate asset task for a defective Device as a Service DaaS asset.
- If you set the **Repair result** field to **Unrepairable**, complete the corresponding Ship task by having the customer ship the asset to you for replacement. For detailed instructions, see Complete the Ship task for a defective Device as a Service DaaS asset.

Complete the Evaluate asset task for a defective Device as a Service DaaS asset

After you repair a defective DaaS asset, complete the Evaluate asset task by evaluating the asset and determining if it can be redeployed.

Before you begin

Before you can begin the Evaluate asset task, you must complete the preceding Repair asset task by repairing the asset. For detailed instructions, see Complete the Repair asset task for a defective Device as a Service DaaS asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider RMA response order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**. **b.** From the list of available RMA response orders, select the order that you want to complete. **c.** On the RMA response order record, select the **RMA response order lines** tab. **d.** From the list of available RMA response order lines, select the order line that you want to evaluate the repaired asset for.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
	Note: You must select an order line that you have already completed the Repair asset task for. **e.** On the RMA response order line record, se lect the **Asset tasks** tab.
Provider RMA response order line	**a.** From the navigation menu of the Asset oper ations view, navigate to **Provider** > **Provider RMA response order line**. **b.** From the list of available RMA response or der lines, select the order line that you want to evaluate the repaired asset for. **Note:** You must select an order line that you have already completed the Repair asset task for. **c.** On the RMA response order line record, se lect the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset opera tions view, navigate to **Provider** > **Provider as set tasks**.

3. From the list of available tasks, select the task number for the Evaluate asset task that you want to complete.
4. On the **Details** tab of the Evaluate asset task, fill in the fields.

Details tab

Field	Description
Assignment group	Group that the task is assigned to.
Evaluation result	Result of the evaluation. Select one of the following options: ○ **Redeployable**: The repair was successful, so the asset can be redeployed. ○ **To be disposed**: The repair was unsuccessful, so the asset must be disposed of.
Issue identified	Reason that the repair was unsuccessful. Fill in this field only if you set the **Evaluation result** field to **To be disposed**.
Work notes	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

Note: If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The Evaluate asset task closes with an updated state of Closed Complete.
- If you set the **Evaluation result** field to **Redeployable** and you performed an on-site repair, the RMA response order line moves to the Completed stage. The customer can redeploy the asset at any time.
- If you set the **Evaluation result** field to **Redeployable** and you performed an off-site repair, a corresponding Ship task is automatically generated.

What to do next

- If you set the **Evaluation result** field to **Redeployable** and you performed an off-site repair, complete the corresponding Ship task by shipping the repaired asset back to the customer so that it can be redeployed. For detailed instructions, see Complete the Ship task for a defective Device as a Service DaaS asset.
- If you set the **Repair result** field to **Unrepairable**, the customer must dispose of the asset. For detailed instructions, see Create a disposal order in the Enterprise Asset Workspace.

Complete the Ship task for a defective Device as a Service DaaS asset

If you want to perform a replacement or an off-site repair for a defective DaaS asset, you must complete the associated Ship task by having the customer ship the asset to you. If you choose to repair the asset, you must complete the associated Ship task by shipping the asset back to the customer after a successful repair.

Before you begin

Before you can begin the Ship task, you must complete the preceding task.

- If you are performing an on-site replacement, you must complete the preceding Evaluate RMA asset task by evaluating the asset and indicating that it must be replaced. For detailed instructions, see Complete the Evaluate RMA asset task for a defective Device as a Service DaaS asset.
- If you are performing an off-site repair or replacement, you must complete the preceding RMA assessment task by assessing the asset and indicating that it must be repaired or replaced off-site. For detailed instructions, see Complete the RMA assessment task for a defective Device as a Service DaaS asset.
- Before you can ship a repaired asset back to a customer, you must complete the preceding Evaluate asset task by evaluating the asset and verifying that it was repaired successfully. For detailed instructions, see Complete the Evaluate asset task for a defective Device as a Service DaaS asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider RMA response order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**. **b.** From the list of available RMA response orders, select the order that you want to complete.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
	c. On the RMA response order record, select the **RMA response order lines** tab. **d.** From the list of available RMA response or der lines, select the order line that you want to ship the asset for. **Note:** You must select an order line that you have already completed the Evaluate RMA asset, RMA assess ment, or Evaluate asset task for. **e.** On the RMA response order line record, se lect the **Asset tasks** tab.
Provider RMA response order line	**a.** From the navigation menu of the Asset oper ations view, navigate to **Provider** > **Provider RMA response order line**. **b.** From the list of available RMA response or der lines, select the order line that you want to ship the asset for. **Note:** You must select an order line that you have already completed the Evaluate RMA asset, RMA assess ment, or Evaluate asset task for. **c.** On the RMA response order line record, se lect the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset opera tions view, navigate to **Provider** > **Provider as set tasks**.

3. From the list of available tasks, select the task number for the Ship task that you want to complete.
4. On the **Details** tab of the Ship task, fill in the fields.

Details tab

Field	Description
Due date	Date and time at which you must complete the task. **Note:** This field is editable only if you are shipping the asset to the customer.
Shipping carrier	Shipping carrier through which you are shipping the asset. For example, **DHL**.
Ship from	Geographic location that you are shipping the asset from.
Ship date	Date and time at which you shipped the asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Assignment group	Group that the task is assigned to.
Assigned to	User who the task is assigned to. **Note:** This field is editable only if you are shipping the asset to the customer.
Tracking number	Tracking number that you can use to track the status and location of the asset shipment.
Ship to	Geographic location that you are shipping to asset to.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

Note: If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The Ship task closes with an updated state of Closed Complete.
- A corresponding shipment record is automatically created for the asset shipment. A reference to the shipment record is populated in the **Shipment order** field of the Ship task. You can view and manage the shipment record from the Shipments list of the Asset operations view. For detailed instructions, see View and add enterprise asset shipments.
- A corresponding Receive asset task is automatically generated.

What to do next

Complete the corresponding Receive asset task by confirming that the shipped asset was received. For detailed instructions, see Complete the Receive asset task for a defective Device as a Service DaaS asset.

Complete the Receive asset task for a defective Device as a Service DaaS asset

After a customer ships a defective DaaS asset to you for repair or replacement, or after you ship a repaired DaaS asset back to a customer, complete the Receive asset task by verifying that the asset was received successfully.

Before you begin

Before you can begin the Receive asset task, you must complete the preceding Ship task by having the customer ship the asset to you or by shipping the asset back to the customer. For detailed instructions, see Complete the Ship task for a defective Device as a Service DaaS asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
Provider RMA response order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order**. **b.** From the list of available RMA response orders, select the order that you want to complete. **c.** On the RMA response order record, select the **RMA response order lines** tab. **d.** From the list of available RMA response order lines, select the order line that you want to verify the asset receipt for. **Note:** You must select an order line that you have already completed the Ship task for. **e.** On the RMA response order line record, select the **Asset tasks** tab.
Provider RMA response order line	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider RMA response order line**. **b.** From the list of available RMA response order lines, select the order line that you want to verify the asset receipt for. **Note:** You must select an order line that you have already completed the Ship task for. **c.** On the RMA response order line record, select the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider asset tasks**.

3. From the list of available tasks, select the task number for the Receive asset task that you want to complete.
4. On the **Details** tab of the Receive asset task, fill in the fields.

Details tab

Field	Description
Due date	Date and time at which you must complete the task. **Note:** This field is editable only if you are verifying that a customer received the asset.
Asset	Asset that was shipped.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Asset received	Option that indicates if the asset was received. Select either **Yes** or **No**.
Assignment group	Group that the task is assigned to.
Assigned to	User who the task is assigned to. **Note:** This field is editable only if you are verifying that a customer received the asset.
Tracking number	Tracking number that you can use to track the status and location of the asset shipment.
Stockroom	Stockroom that the asset was added to.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

Note: If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The Receive asset task closes with an updated state of Closed Complete.
- If you successfully received a defective DaaS asset from a customer for an on-site replacement, the RMA response order line moves to the Completed stage. A corresponding inbound asset order is automatically created.
- If you successfully received a defective DaaS asset from a customer for an off-site repair or replacement, a corresponding Evaluate RMA asset task is automatically generated.
- If a customer successfully received a DaaS asset that you repaired, the RMA response order line moves to the Completed stage.

What to do next

- If you successfully received a defective DaaS asset from a customer for an on-site replacement, complete the corresponding inbound asset order to provide the customer with a new asset. For detailed instructions, see Completing an inbound asset order for requested Device as a Service (DaaS) assets.
- If you successfully received a defective DaaS asset from a customer for an off-site repair or replacement, complete the corresponding Evaluate RMA asset task by evaluating the asset and determining whether you want to repair or replace it. For detailed instructions, see Complete the Evaluate RMA asset task for a defective Device as a Service DaaS asset.

Managing inbound asset orders for requested Device as a Service (DaaS) assets

If you are a DaaS provider, vendor, or manufacturer, you can create and manage provider-based inbound asset orders to provide your customers with the DaaS assets that are requested through your Return Merchandise Authorization (RMA) response orders.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

To successfully fulfill a request, you must perform the following tasks in the inbound asset order workflow:

1. Create an inbound asset order
2. Create corresponding inbound asset order lines
3. Complete the inbound asset order

Create an inbound asset order for requested Device as a Service (DaaS) assets

Create an inbound asset order to track and manage the process of providing your customers with the DaaS assets that are requested through your Return Merchandise Authorization (RMA) response orders.

Before you begin

Role required: sn_eam_provider.provider_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound orders**.
3. Select **New**.
4. On the form, fill in the fields.

Create New Inbound asset order form

Field	Description
External request reference	Customer-provided reference number for the asset request that you want to fulfill. You can use this reference number to track the source of the inbound asset order.
DaaS account	DaaS account of the customer who submitted the asset request. You can use this information to determine which assets are leased to the account.
Delivery address	Address of the customer who submitted the asset request.
Requested for	Name of the customer who submitted the asset request.
Estimated delivery date	Estimated delivery date of the assets that you are sending to the customer.

5. Select **Save**.

What to do next

Create corresponding inbound asset order lines for the DaaS assets that you want to provide to your customers through the inbound asset order. For detailed instructions, see Create an inbound asset order line for a requested Device as a Service (DaaS) asset.

Create an inbound asset order line for a requested Device as a Service (DaaS) asset

Create an inbound asset order line for each DaaS asset that you want to provide to your customers through an inbound asset order. Use each order line to track and manage the tasks that you must complete to provide the given asset to the customer.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: sn_eam_provider.provider_asset_manager

Procedure
1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Inbound asset order lines list.

Navigation option	Procedure
Provider inbound asset order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order**. **b.** From the list of available inbound asset orders, select the order that you want to create an inbound asset order line for. **c.** On the inbound asset order record, select the **Inbound asset order lines** tab.
Provider inbound asset order line	From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order line**.

3. Select **New**.
4. On the form, fill in the fields.

Create New Inbound asset order line form

Field	Description
Model	Model of the asset that you want to provide to the customer.
Assigned to	User who is assigned to provide the asset to the customer.

5. Select **Save**.

Result
- The inbound asset order line is added to the associated inbound asset order.
- An Asset selection task is automatically generated for the inbound asset order line.

What to do next
Perform all tasks that are required for completing the inbound asset order line so that you can complete and close the associated inbound asset order. For detailed instructions, see Completing an inbound asset order for requested Device as a Service (DaaS) assets.

Completing an inbound asset order for requested Device as a Service (DaaS) assets

After you create an inbound asset order with corresponding inbound asset order lines, you must perform various tasks to complete and close the order.

You must complete the following tasks for each inbound asset order line within an inbound asset order:

1. Asset selection task to select the DaaS asset that you want to provide to the customer.
2. Asset pick task to pick the DaaS asset from the specified stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Asset prepare task to prepare the DaaS asset for shipment.
4. Asset ship task to ship the DaaS asset to the customer.
5. Receive task to verify that the customer received the DaaS asset.

After you complete all tasks for a given order line, it moves to the Completed stage. After every order line reaches the Completed stage, the order is closed.

Complete the Asset selection task for a requested Device as a Service (DaaS) asset

Complete the Asset selection task for a requested DaaS asset by selecting an asset that matches the criteria specified in the associated inbound asset order line.

Before you begin

Role required: sn_eam_provider.provider_asset_manager

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider inbound asset order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order**. **b.** From the list of available inbound asset orders, select the order that you want to complete. **c.** On the inbound asset order record, select the **Inbound asset order lines** tab. **d.** From the list of available inbound asset order lines, select the order line that you want to choose an asset for. **e.** On the inbound asset order line record, select the **Asset tasks** tab.
Provider inbound asset order line	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order line**. **b.** From the list of available inbound asset order lines, select the order line that you want to choose an asset for. **c.** On the inbound asset order line record, select the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider asset tasks**.

3. From the list of available tasks, select the task number for the Asset selection task that you want to complete.
4. On the **Details** tab of the Asset selection task, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details tab

Field	Description
Due date	Date and time at which you must complete the task.
Stockroom	Stockroom that you are selecting the asset from.
Assignment group	Group that the task is assigned to.
Assigned to	User who the task is assigned to.
Asset	Asset that you are selecting for the inbound asset order line. Select an asset that meets the following criteria: ○ Matches all criteria specified in the order line. ○ The **DaaS asset** option is enabled in the corresponding asset record. ○ An account is specified in the **DaaS account** field of the corresponding asset record. **Note:** For more information on the **DaaS asset** and **DaaS account** fields, see Asset fields for enterprise assets.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes (Private)	Notes about that task that are visible to all users within your organization.

5. Select **Close Task**.

Note: If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The Asset selection task closes with an updated state of Closed Complete.
- A corresponding Asset pick task is automatically generated.

What to do next

The provider asset technician must complete the corresponding Asset pick task by picking the asset that you selected for the inbound asset order line. For detailed instructions, see Complete the Asset pick task for a requested Device as a Service (DaaS) asset.

Complete the Asset pick task for a requested Device as a Service (DaaS) asset

Complete the Asset pick task for a requested DaaS asset by picking the asset that a provider asset manager selected for an inbound asset order line. You must pick the asset from the stockroom that the provider asset manager specified when selecting the asset.

Before you begin

Before you can begin the Asset pick task, a provider asset manager must complete the preceding Asset selection task by selecting an asset for the inbound asset order line. For detailed instructions, see Complete the Asset selection task for a requested Device as a Service (DaaS) asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider inbound asset order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order**. **b.** From the list of available inbound asset orders, select the order that you want to complete. **c.** On the inbound asset order record, select the **Inbound asset order lines** tab. **d.** From the list of available inbound asset order lines, select the order line that you want to pick an asset for. **Note:** You must select an order line that a provider asset manager has already completed the Asset selection task for. **e.** On the inbound asset order line record, select the **Asset tasks** tab.
Provider inbound asset order line	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order line**. **b.** From the list of available inbound asset order lines, select the order line that you want to pick an asset for. **Note:** You must select an order line that a provider asset manager has already completed the Asset selection task for. **c.** On the inbound asset order line record, select the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider asset tasks**.

3. From the list of available asset tasks, select the task number for the Asset pick task that you want to complete.
4. On the **Details** tab of the Asset pick task, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details tab

Field	Description
Asset pick task	
Assignment group	Group that the task is assigned to.
Assigned to	User who the task is assigned to.
Due date	Date and time at which you must complete the task.
Drop off location	Location where the asset must be delivered.
Notes	
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

Note: If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The Asset pick task closes with an updated state of Closed Complete.
- A corresponding Asset prepare task is automatically generated.

What to do next

Complete the corresponding Asset prepare task by preparing the picked asset for shipment. For detailed instructions, see Complete the Asset prepare task for a requested Device as a Service (DaaS) asset.

Complete the Asset prepare task for a requested Device as a Service (DaaS) asset

Before you ship the DaaS asset that you picked for an inbound asset order line, complete the Asset prepare task for it by completing any necessary pre-shipment checklists and by inspecting it for defects.

Before you begin

Before you can begin the Asset prepare task, you must complete the preceding Asset pick task by picking the asset from the stockroom that the provider asset manager specifies. For detailed instructions, see Complete the Asset pick task for a requested Device as a Service (DaaS) asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
Provider inbound asset order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider asset inbound order**. **b.** From the list of available inbound asset orders, select the order that you want to complete. **c.** On the inbound asset order record, select the **Inbound asset order lines** tab. **d.** From the list of available inbound asset order lines, select the order line that you want to prepare an asset for. **Note:** You must select an order line that you have already completed the Asset pick task for. **e.** On the inbound asset order line record, select the **Asset tasks** tab.
Provider inbound asset order line	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order line**. **b.** From the list of available inbound asset order lines, select the order line that you want to prepare an asset for. **Note:** You must select an order line that you have already completed the Asset pick task for. **c.** On the inbound asset order line record, select the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider asset tasks**.

3. From the list of available tasks, select the task number for the Asset prepare task that you want to complete.
4. On the **Details** tab of the Asset prepare task, fill in the fields.

Details tab

Field	Description
Due date	Date and time at which you must complete the task.
Stockroom	Stockroom that the asset is located in.
Assignment group	Group that the task is assigned to.
Assigned to	User who the task is assigned to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes (Private)	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

> **Note:** If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The Asset prepare task closes with an updated state of Closed Complete.
- A corresponding Asset ship task is automatically generated.

What to do next

Complete the corresponding Asset ship task by shipping the prepared asset to the customer that the asset is requested for. For detailed instructions, see Complete the Asset ship task for a requested Device as a Service (DaaS) asset.

Complete the Asset ship task for a requested Device as a Service (DaaS) asset

After you prepare the DaaS asset that you picked for an inbound asset order line, complete the Asset ship task for it by shipping it to the customer that it is requested for.

Before you begin

Before you can begin the Asset ship task, you must complete the preceding Asset prepare task by preparing the asset for shipment. For detailed instructions, see Complete the Asset prepare task for a requested Device as a Service (DaaS) asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider inbound asset order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order**. **b.** From the list of available inbound asset orders, select the order that you want to complete. **c.** On the inbound asset order record, select the **Inbound asset order lines** tab. **d.** From the list of available inbound asset order lines, select the order line that you want to ship an asset for.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
	Note: You must select an order line that you have already completed the Asset prepare task for. **e.** On the inbound asset order line record, se lect the **Asset tasks** tab.
Provider inbound asset order line	**a.** From the navigation menu of the Asset oper ations view, navigate to **Provider** > **Provider inbound asset order line**. **b.** From the list of available inbound asset or der lines, select the order line that you want to ship an asset for. **Note:** You must select an order line that you have already completed the Asset prepare task for. **c.** On the inbound asset order line record, se lect the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset opera tions view, navigate to **Provider** > **Provider as set tasks**.

3. From the list of available tasks, select the task number for the Asset ship task that you want to complete.
4. On the **Details** tab of the Asset ship task, fill in the fields.

Details tab

Field	Description
Due date	Date and time at which you must complete the task.
Shipping carrier	Shipping carrier through which you are shipping the asset. For example, **DHL**.
Ship from	Geographic location that you are shipping the asset from.
Ship date	Date and time at which you shipped the asset.
Assignment group	Group that the task is assigned to.
Assigned to	User who the task is assigned to.
Tracking number	Tracking number that you can use to track the status and location of the asset shipment.
Ship to	Geographic location that you are shipping to asset to.
Short description	Brief description of the task.
Description	Detailed description of the task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Work notes (Private)	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

> **Note:** If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

Result

- The Asset ship task closes with an updated state of Closed Complete.
- A corresponding shipment record is automatically created for the asset shipment. A reference to the shipment record is populated in the **Shipment order** field of the Asset ship task. You can view and manage the shipment record from the Shipments list of the Asset operations view. For detailed instructions, see View and add enterprise asset shipments.
- A corresponding Receive task is automatically generated.

What to do next

Complete the corresponding Receive task by verifying that the customer successfully received the shipped asset. For detailed instructions, see Complete the Receive task for a requested Device as a Service (DaaS) asset.

Complete the Receive task for a requested Device as a Service (DaaS) asset

After you ship the DaaS asset that you prepared for an inbound asset order line, complete the Receive task for it by verifying that the customer received it successfully.

Before you begin

Before you can begin the Receive task, you must complete the preceding Asset ship task by shipping the asset. For detailed instructions, see Complete the Asset ship task for a requested Device as a Service (DaaS) asset.

Role required: sn_eam_provider.provider_asset_technician

Procedure

1. From the Enterprise Asset Workspace, open the Asset operations view.
2. Open the Asset tasks list.

Navigation option	Procedure
Provider inbound asset order	**a.** From the navigation menu of the Asset operations view, navigate to **Provider** > **Provider inbound asset order**. **b.** From the list of available inbound asset orders, select the order that you want to complete. **c.** On the inbound asset order record, select the **Inbound asset order lines** tab. **d.** From the list of available inbound asset order lines, select the order line that you want to verify the asset receipt for.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Navigation option	Procedure
	Note: You must select an order line that you have already completed the Asset ship task for. **e.** On the inbound asset order line record, se lect the **Asset tasks** tab.
Provider inbound asset order line	**a.** From the navigation menu of the Asset oper ations view, navigate to **Provider** > **Provider inbound asset order line**. **b.** From the list of available inbound asset or der lines, select the order line that you want to verify the asset receipt for. **Note:** You must select an order line that you have already completed the Asset ship task for. **c.** On the inbound asset order line record, se lect the **Asset tasks** tab.
Provider asset tasks	From the navigation menu of the Asset opera tions view, navigate to **Provider** > **Provider as set tasks**.

3. From the list of available tasks, select the task number for the Receive task that you want to complete.
4. On the **Details** tab of the Receive task, fill in the fields.

Details tab

Field	Description
Due date	Date and time at which you must complete the task.
Asset	Asset that was shipped to the customer.
Asset received	Option that indicates if the customer received the asset. Select either **Yes** or **No**.
Assignment group	Group that the task is assigned to.
Assigned to	User who the task is assigned to.
Short description	Brief description of the task.
Description	Detailed description of the task.
Work notes	Notes about the task that are visible to all users within your organization.

5. Select **Close Task**.

Note: If you want to save your progress and close the task at a later time, select **Save** instead. You can return to the task at any time.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- The Receive task closes with an updated state of Closed Complete.
- The inbound asset order line moves to the Completed stage.
- The state of the asset changes to In Transit.

Expanded Model and Asset Classes

The Expanded Model and Asset Classes application adds model and asset classes that extend base classes within the Configuration Management Database (CMDB) class hierarchy. These extensions include class descriptions, identification rules, identifier entries, and dependent relationships. The application also adds model categories and API categories.

Note: This application is compatible with the Rome and later family releases.

For more information on the CMDB, see Configuration Management Database (CMDB).

In addition to extending CMDB model and asset classes, the Expanded Model and Asset Classes application creates model categories that associate model and asset classes with CMDB configuration item (CI) classes. The Enterprise Asset Management application uses these classes and model categories to create asset and model records that can be used to track and manage enterprise assets. Discovery tools, such as the ServiceNow® Discovery application, can also use these classes and model categories to create asset and model records for discovered CIs. See Model categories for more information on model categories.

The Expanded Model and Asset Classes application also adds the API and Managed API model categories, which allow the Configuration Management Database (CMDB) application to create and associate application models with API and Managed API CMDB CI classes. API CMDB CI classes provide classifications for APIs (application programming interfaces), which are sets of definitions and protocols that enable computer programs to communicate with each other. Managed API CMDB CI classes provide classifications for APIs that are discovered through gateways or management services, such as Amazon API Gateway. By associating application models with these CMDB CI classes, the Configuration Management Database (CMDB) application can create version-agnostic representations of your APIs. These representations can then provide a more holistic view of each API during reporting and analysis. For more information on API and Managed API CMDB CI classes, see API extension classes.

Enterprise model and asset classes added by the application

The Expanded Model and Asset Classes application adds enterprise model classes that extend the base Product model [cmdb_model] class and enterprise asset classes that extend the Base asset [alm_base] class. For more information on these enterprise model and asset classes, see Enterprise model and asset classes.

Service model classes added by the application

The Expanded Model and Asset Classes application adds the following child classes to the base Service model [cmdb_service_product_model] class. These child classes provide classifications for various service model types.

Service Model Child Classes

Service model child class	Role required for read access	Description
Card service model [sn_ent_card_service_model]	sn_ent.card_service_model_viewer	Classifies service models that

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Service Model Child Classes (continued)

Service model child class	Role required for read access	Description
		are based on card offerings from banks and financial institutions, such as credit cards and gift cards.
Deposit model [sn_ent_deposit_account_model]	sn_ent.deposit_account_model_viewer	Classifies service models that are based on deposit accounts offered by banks and financial institutions, such as savings and checking accounts.
Loan model [sn_ent_loan_account_model]	sn_ent.loan_account_model_viewer	Classifies service models that are based on loan options offered by banks and financial institutions, such as personal loans and mortgage loans.
Line of credit model [sn_ent_line_of_credit_model]	sn_ent.line_of_credit_model_viewer	Classifies service models that are based on lines of credit offered by banks and financial institutions, such as overdrafts on savings and checking accounts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Service Model Child Classes (continued)

Service model child class	Role required for read access	Description
Financial service model [sn_ent_financial_services_model]	sn_ent.financial_services_model_viewer	Classifies service models that are based on financial services offered by banks and financial institutions, such as safe lockers and wire services.
Investment model [sn_ent_investment_model]	sn_ent.investment_model_viewer	Classifies service models that are based on wealth management options offered by banks and financial institutions, such as mutual funds and retirement planning.
Personal lines insurance product model [sn_ent_b2c_ins_policy_model]	sn_ent.b2c_ins_policy_model_viewer	Classifies service models that are based on personal lines insurance policies offered by insurance carriers, such as coverage and payment plans for personal auto insurance.
Commercial lines insurance product model [sn_ent_b2b_ins_policy_model]	sn_ent.b2b_ins_policy_model_viewer	Classifies service models that are based on commercial lines

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Service Model Child Classes (continued)

Service model child class	Role required for read access	Description
		insurance policies offered by insurance carriers, such as coverage and payment plans for commercial property insurance.
Group life insurance product model [sn_ent_group_life_ins_policy_model]	sn_ent.group_life_ins_policy_model_viewer	Classifies service models that are based on group life insurance policies offered by insurance carriers, such as coverage and payment plans for group term life insurance.
Individual life product model [sn_ent_indiv_life_ins_policy_model]	sn_ent.indiv_life_ins_policy_model_viewer	Classifies service models that are based on individual life insurance policies offered by insurance carriers, such as coverage and payment plans for individual whole life insurance.
Medical insurance model [sn_ent_medical_insurance_model]	sn_ent_medical_insurance_model_viewer	Classifies medical insurance models, including health insurance plans and government

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Service Model Child Classes (continued)

Service model child class	Role required for read access	Description
		insurance programs such as Medicare or Medicaid.
Social benefit model [sn_ent_social_benefit_model]	sn_ent.social_benefit_model_viewer	Classifies service models that are based on social insurance programs and means-tested assistance programs, such as social security and the Supplemental Nutrition Assistance Program (SNAP).
Investigative service model [sn_ent_investigative_service_model]	N/A	Classifies service models that are based on the types of cases that government and private agencies investigate, such as fraud and assault.

Contract model classes added by the application

Contract model class	Role required for read access	Description
Permit model [sn_ent_permit_model]	contract_manager	The Permit model is an extension of the Contract model table and is used to model licenses and permits that have been issued and entitles the recipients to perform certain activities or make use of specific resources.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Firmware model and Discovered firmware model classes

The Expanded Model and Asset Classes application adds the Firmware model [sn_ent_firmware_model] and Discovered firmware model [sn_ent_discov_firmware_model] classes. These firmware model class tables extend the tables that the CMDB CI Data Foundation application installs.

The Firmware installation [cmdb_firmware_install] table added with the CMDB CI class model application stores the installation records based on the firmware embedded into assets. Based on the records in the Firmware installation table, the Discovered firmware model and Firmware model tables store the details of the firmware.

AI model classes added by the application

The Expanded Model and Asset Classes application adds the AI system component product model [cmdb_ai_systems_component_product_model] class, which extends the Software component model [cmdb_sw_component_model] class. The application also adds the AI content product model [cmdb_ai_content_product_model] class, which extends the Content product model [cmdb_content_product_model] class. Both the Software component model [cmdb_sw_component_model] class and Content product model [cmdb_content_product_model] class extend the base Product model [cmdb_model] class.

The AI system component product model [cmdb_ai_systems_component_product_model] class classifies product models that are based on AI system components, such as machine learning, Natural Language Processing (NLP), and generative or agentic AI.

The AI content product model [cmdb_ai_content_product_model] class includes classifications for various AI content model types, which are categorized into the following child classes:

AI content product model child classes

AI content product model child class	Description
AI model product model [cmdb_ai_model_product_model]	Classifies content models for the AI models that are used to generate AI system responses without any human intervention. Examples of AI models include Now LLM and GPT 3.5 Turbo.
AI dataset product model [cmdb_ai_dataset_product_model]	Classifies content models for the datasets that are used to train and test AI models. Examples of datasets include Wikipedia and Google Open Images.
AI prompt product model [cmdb_ai_prompt_product_model]	Classifies content models for the prompts, or instructions, that are given to AI models to generate AI system responses without any human intervention. Examples of prompts include sets of instructions to generate x-char summaries for given inputs in specific tones or voices.

AI asset classes added by the application

The Expanded Model and Asset Classes application adds the AI digital asset [alm_ai_digital_asset] class, which extends the Information asset [alm_information_asset] class. The Information asset [alm_information_asset] class extends the base Asset [alm_asset] class. The AI digital asset [alm_ai_digital_asset] class includes classifications for various AI asset types, which are categorized into the following child classes:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

AI digital asset child classes

AI digital asset child class	Description
AI system digital asset [alm_ai_system_digital_asset]	Classifies the software artifacts that provide machine learning (ML) and AI capabilities for generating outputs, such as decisions, recommendations, content, and predictions. Examples include incident summarization and fraud detection capabilities.
AI model digital asset [alm_ai_model_digital_asset]	Classifies the AI models that are used to generate AI system responses without any human intervention. Examples include Now LLM and GPT 3.5 Turbo.
AI dataset digital asset [alm_ai_dataset_digital_asset]	Classifies the datasets that are used to train and test AI models. Examples include Wikipedia and Google Open Images.
AI prompt digital asset [alm_ai_prompt_digital_asset]	Classifies the prompts, or instructions, that are given to AI models to generate AI system responses without any human intervention. Examples include sets of instructions to generate x-char summaries for given inputs in specific tones or voices.

Install Expanded Model and Asset Classes

You can install the Expanded Model and Asset Classes application (sn_ent) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

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

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Expanded Model and Asset Classes application (sn_ent) using the filter criteria and search bar.

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

   A list of the versions available to you 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.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Verify successful installation of the Expanded Model and Asset Classes application

After you request and install the Expanded Model and Asset Classes application, verify that all enterprise model and asset classes have been added to the CMDB class hierarchy successfully.

Before you begin
Role required: admin

About this task

Warning: Uninstalling the Expanded Model and Asset Classes application may compromise the integrity of the Enterprise Asset Management application, resulting in unexpected behavior.

Procedure

1. Navigate to **All** > **Configuration** > **CI Class Manager**.
2. Select **Hierarchy** to display the CI Classes list, where you can view all classes within the CMDB class hierarchy.
3. Verify that all enterprise model and asset classes have been added to the list.
   Select any class to verify the corresponding class description, identification rules, identifier entries, and dependent relationships.

Create interoperability mappings between assets and models

Create interoperability mappings between assets and models so that you can define their operational relationships at a granular level.

Before you begin
Role required: admin

About this task

Important: You can currently create interoperability mappings for industrial assets only.

Procedure

1. On the page header of your ServiceNow instance, select **All**.
2. In the menu navigation filter, enter `cmdb_asset_ci_model_interoperability_configuration_list.do`.
   The Asset CI Model Interoperability Configuration [cmdb_asset_ci_model_interoperability_configuration] table opens.
3. Select **New**.
4. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset CI Model Interoperability Configuration form

Field	Description
Functional Location	Functional location, such as a test site, that the interoperability mapping applies to.
Configuration Item	Configuration item (CI) of the asset that you want to map to the specified model. **Note:** If you fill in this field, you do not need to fill in the **Asset** field. After you create the interoperability mapping, the **Asset** field automatically populates with the corresponding asset.
Interoperability Type	Operational relationship between the specified asset and model. Select one of the following options: ○ **Compatible With::Compatible With**: Indicates that the specified asset and model are compatible with each other. ○ **Transforms::Transformed By**: Indicates that the specified asset can transform any asset under the specified model. ○ **Produces::Produced By**: Indicates that the specified asset can produce an asset under the specified model. ○ **Uses::Used By**: Indicates that the specified asset can use any asset under the specified model. **Note:** If a desired interoperability type is not available, you can create a new interoperability type.
Asset	Asset that you want to map to the specified model. **Note:** If you fill in this field, you do not need to fill in the **Configuration Item** field. After you create the interoperability mapping, the **Configuration Item** field automatically populates with the corresponding CI.
Interoperable Model 2	Model that you want to map to the specified asset.
Details	
Active	Option that indicates if the interoperability mapping is active.
Effective From	Date on which the interoperability mapping becomes effective.
Effective To	Date on which the interoperability mapping is no longer effective.

5. Select **Submit**.

Common applications

The IT Asset Management application relies on a seamless integrated ecosystem of applications to deliver complete visibility, control, and optimization of IT assets throughout their lifecycle.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The following table highlights the related applications that underpin effective IT Asset Management.

IT Asset Management related applications

Product	Why it is required
Base Asset Management	Serves as the foundational layer for IT Asset Management, providing the core data model, asset repository, and tracking framework. Without it, there is no central system of record for asset attributes, states, relationships, or lifecycle stages. All other IT Asset Management capabilities are built on top of this base.
Contract Management	Enables license compliance and financial accountability by linking assets to their associated agreements, entitlements, warranties, and support contracts. Without this, organizations risk over-spending on renewals, missing expiration dates, or falling out of compliance during audits.
Procurement	Ensures that every asset entering the organization is tracked from the moment it is ordered. Integration with Procurement ties purchase orders, vendor details, and delivery timelines directly to asset records.
Product Catalog	Provides a standardized library of hardware and software models that normalizes asset data across the enterprise. It ensures consistent naming, classification, and attribution, reducing data quality issues and enabling accurate reporting, spend analysis, and lifecycle planning.

Base Asset Management

The Base Asset Management application integrates the physical, technological, contractual, and financial aspects of information technology assets. Base Asset Management focuses on the financial tracking of company property.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Get started

Explore	Use
	
Learn the key features and business value that the Base Asset Management offers.	Use the Base Asset Management to efficiently manage your assets.

Troubleshoot and get help

- Ask or answer questions in the Asset Management ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Asset Management Workspace

The user interface of the Base Asset Management application is enhanced to make it more user-friendly and intuitive, enabling you to manage your hardware installations better.

You can use the Base Asset Management new user interface, referred to as Asset Workspace, or continue using the classic Base Asset Management.

The Base Asset Management application's core functionality remains the same in both the user interfaces.

If you’re using the Base Asset Management application newly from the Vancouver release, the Asset Workspace is installed by default.

Note:

Asset Workspace is not installed by default. It is available starting in the San Diego release. It is installed by default only on zBoot ServiceNow instances, not on ServiceNow instances upgraded to the latest version. When the Hardware Asset Management application is activated, the Hardware Asset Workspace replaces the Asset Workspace.

Using the Asset Management Workspace

The Asset Workspace is a unified medium with multiple views that help you manage your assets efficiently. The views give you visibility into key aspects of your assets. These include dashboards on stockroom, asset count by model, lifecycle state, model category, and overall asset performance.

The Asset Workspace contains the following views:

- Hardware asset overview
- Inventory view
- Asset estate view

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Model management view
- Contract management view

If you're upgrading to the Vancouver release, you must activate the Asset Management Workspace (sn_itam_workspace) plugin to use the Asset Workspace.

Note: After moving to Asset Workspace, you can still use the Asset Management classic. For more information, see Base Asset Management.

Hardware asset overview

Enhance your Base Asset Management experience by using the modernized and user-friendly Hardware asset overview view. The Hardware asset overview is a simplified and intuitive environment that helps you use the application more effectively by reducing complexity.

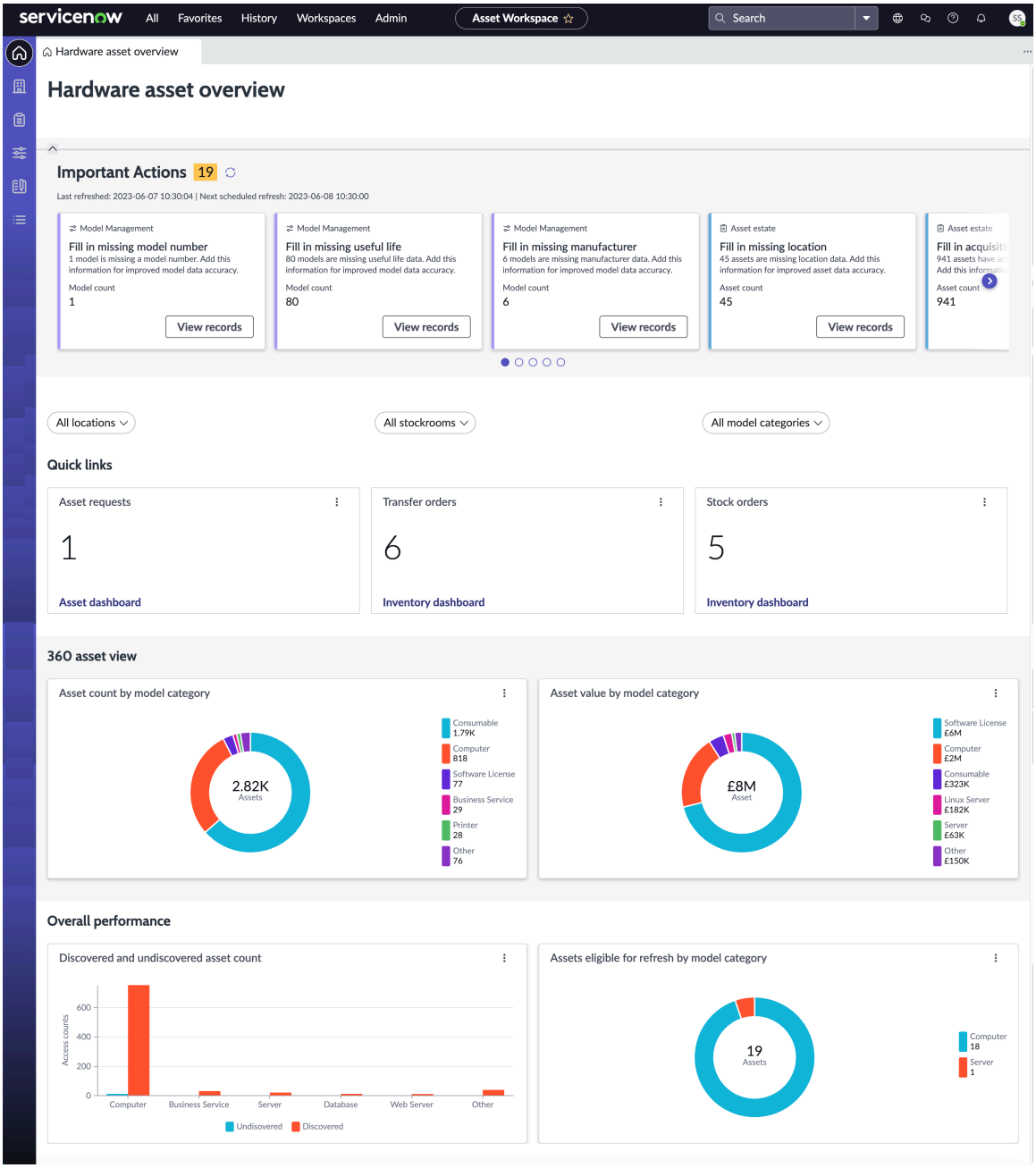
Use the Hardware asset overview view to:

- Act on discrepancies such as when an asset is missing PO number, model number, asset function, or manufacturer.
- Navigate to specific dashboards on asset functions such as Asset requests, Transfer orders, and Stock orders.
- View the 360 asset view section displaying asset counts by model category and asset value by model category.
- View the overall performance section displaying the Discovered and undiscovered asset count and Assets eligible for refresh by model category.

Select any widget or chart to view detailed information and take appropriate actions. You can also use **Location**, **Stockroom**, and **Model category** lists to filter your results.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Hardware asset overview



Quick links

Widget or chart	Description
Asset requests	Number of requested items where the item's model is hardware, consumable, or bundle.
Transfer orders	Number of active transfer orders.
Stock orders	Number of requested hardware inventory stock order items.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

360 asset view

Widget or chart	Description
Asset count by model category	Number of assets grouped by the model category such as Consumable, Computer, and Mobile Device.
Asset value by model category	Cost of assets grouped by the model category such as Software License, Consumable, and Server.

Overall performance

Widget or chart	Description
Discovered and undiscovered asset count	Comparison of the number of discovered and undiscovered assets grouped by model category. Undiscovered assets are the assets that aren't discovered at all or not discovered within one month.
Assets eligible for refresh by model category	Number of assets that have already expired or the current day is the expiry date, and are eligible for a refresh.

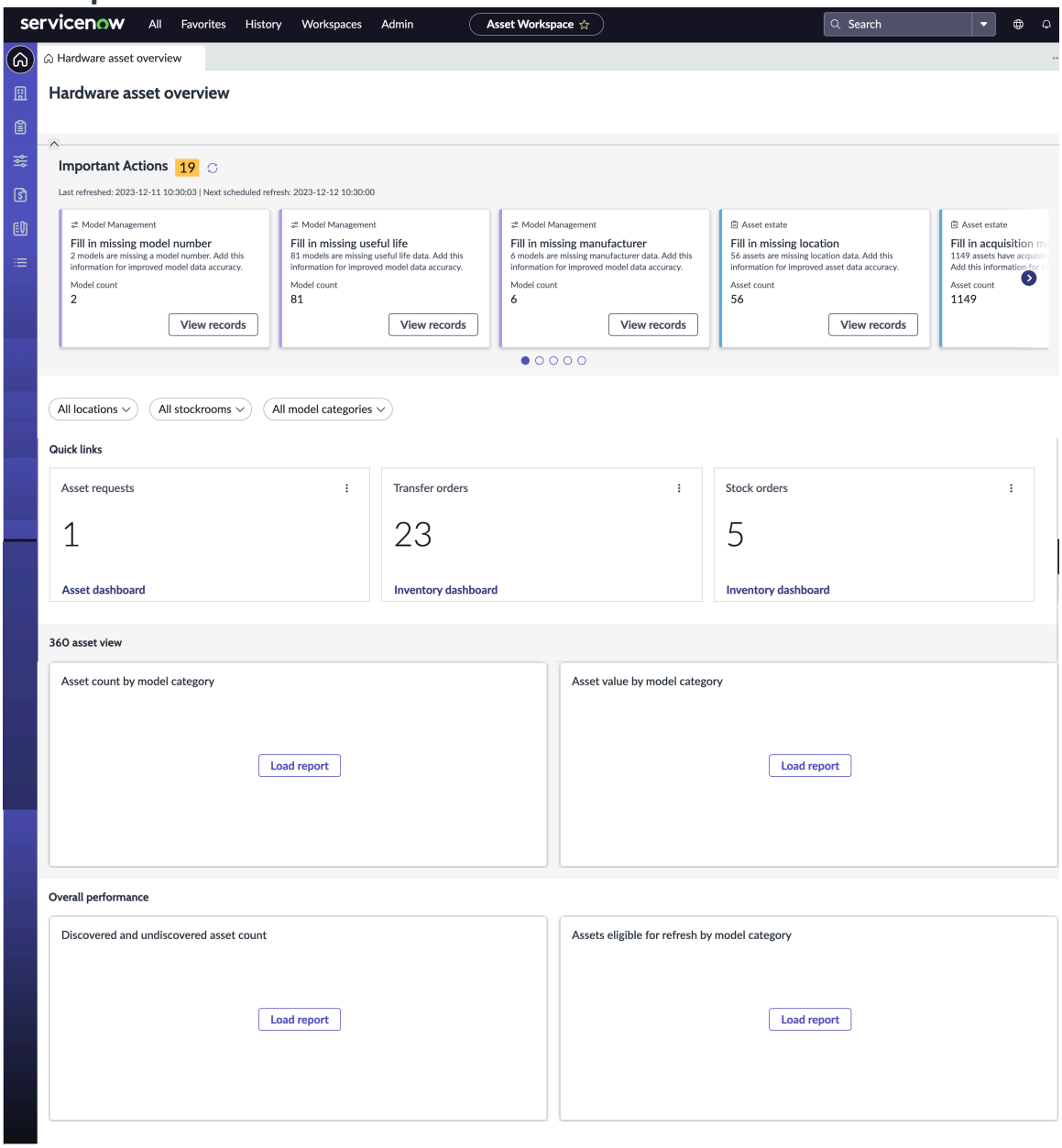
Load reports on Hardware asset overview

You can load charts or widgets that fetch a huge set of asset records on demand instead of loading them along with the page. This approach enables you to reduce the loading time for the Hardware asset overview page.

The system property *sn_itam_workspace.asset_overview_enable_lazy_loading* provides you with an option to either selectively load reports you want to view or load reports concurrently with the page. By default, this system property is set to **False**. When this system property is enabled on your ServiceNow instance, you can view reports by using the **Load report** option.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Load reports on Hardware Asset overview



Inventory view

Use the Inventory view in the Asset Workspace to view and manage inventory-related functions such as stockrooms and transfer orders.

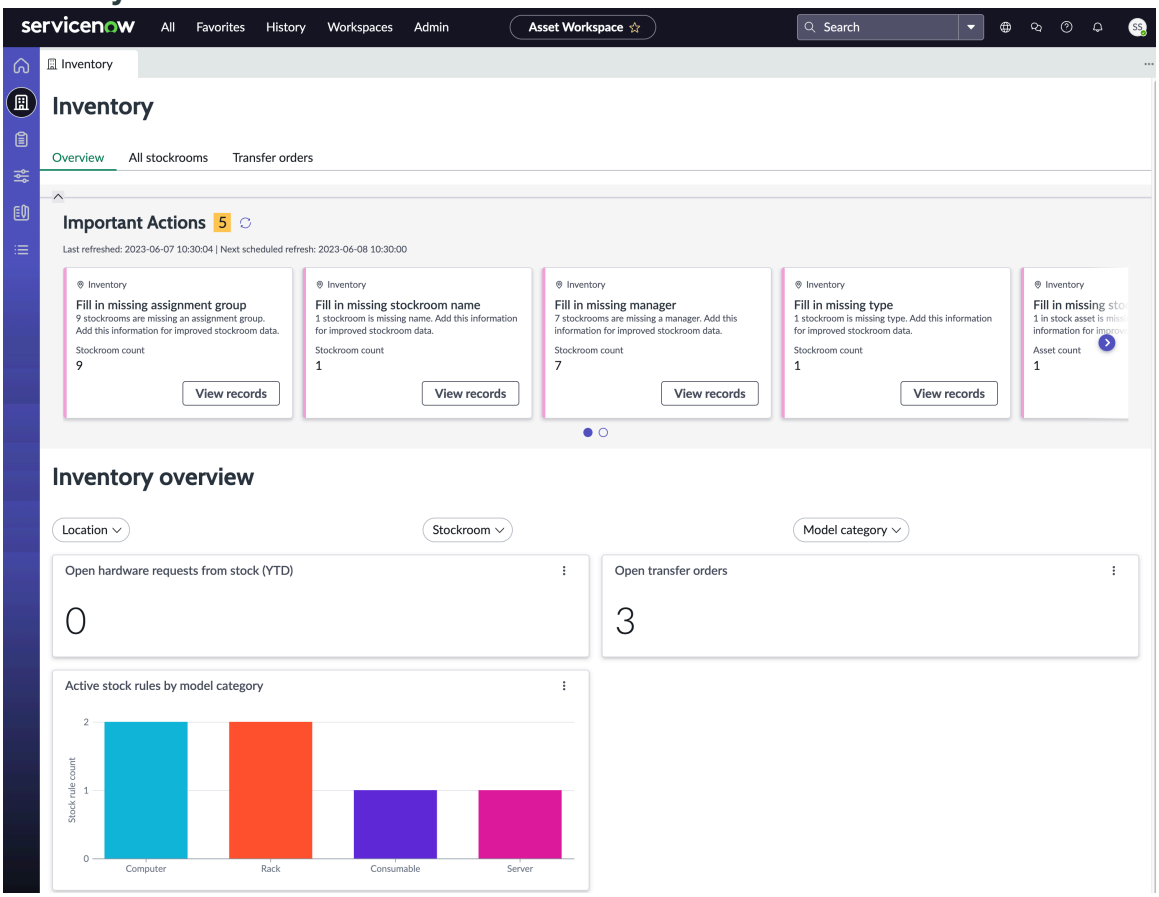
The Inventory view provides access to actions for filling in missing stockroom details such as assignment group, stockroom name, manager, and type.

Select any widget or chart to view the details. You can also use Location, Stockroom, Model category, and Domain filters to narrow down your results.

Note: The Domain filter is available only when you've enabled the Domain Extensions Installer (com.glide.domain.msp_extensions.installer) and Domain Separation (plugin com.snc.pa.domain_support) plugins.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Inventory view



Inventory overview

Widget or chart	Description
Open hardware requests from stock (YTD)	Number of transfer orders of Procurement type that are already delivered and created this calendar year.
Open transfer orders	Number of canceled or undelivered transfer orders.
Active stock rules by model category	All active stock rules grouped by their model category.

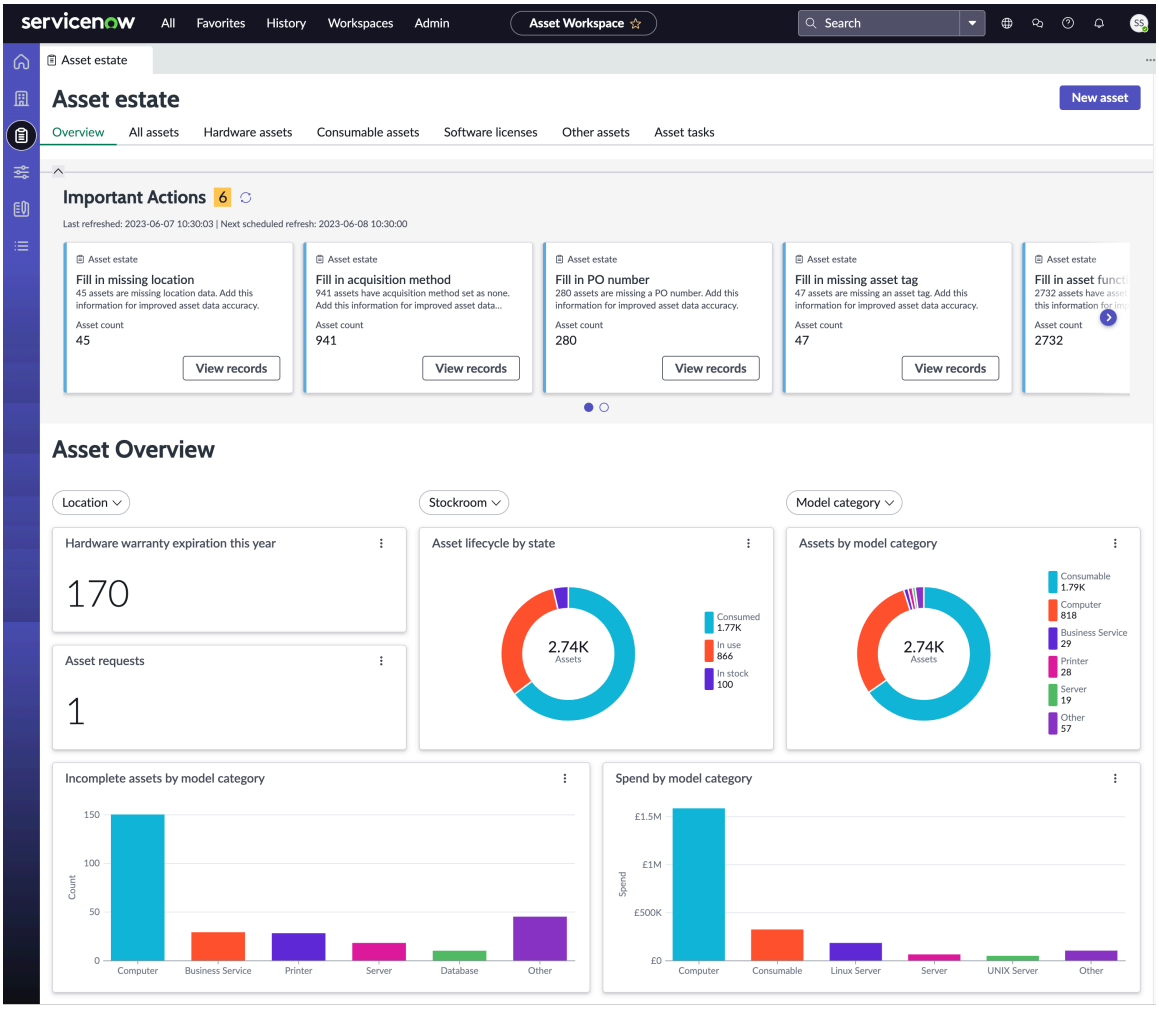
Asset estate view

Use the Asset estate view in the Asset Workspace to create, view, and modify the assets and also manage asset functions and notifications.

Note: Software license tab is hidden when Software Asset Management (com.snc.software_asset_management) or Software Asset Management Professional (com.snc.pa.samp) is active. You can view this Software license tab in Software Asset Workspace.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset estate view



Asset overview

Chart or widget	Description
Hardware warranty expiration this year	Count of hardware and consumable assets that are expiring this current year.
Asset requests	Count of hardware, consumable, and bundle requests in the catalog.
Asset lifecycle by state	Number of assets grouped by the lifecycle state such as Retired, In use, In stock.
Assets by model category	Number of assets grouped by the model category such as Software License, Consumable, Server.
Incomplete assets by model category	Asset models without purchase order number, purchase order line, or receiving line.
Spend by model category	Cost of assets grouped by their model category.

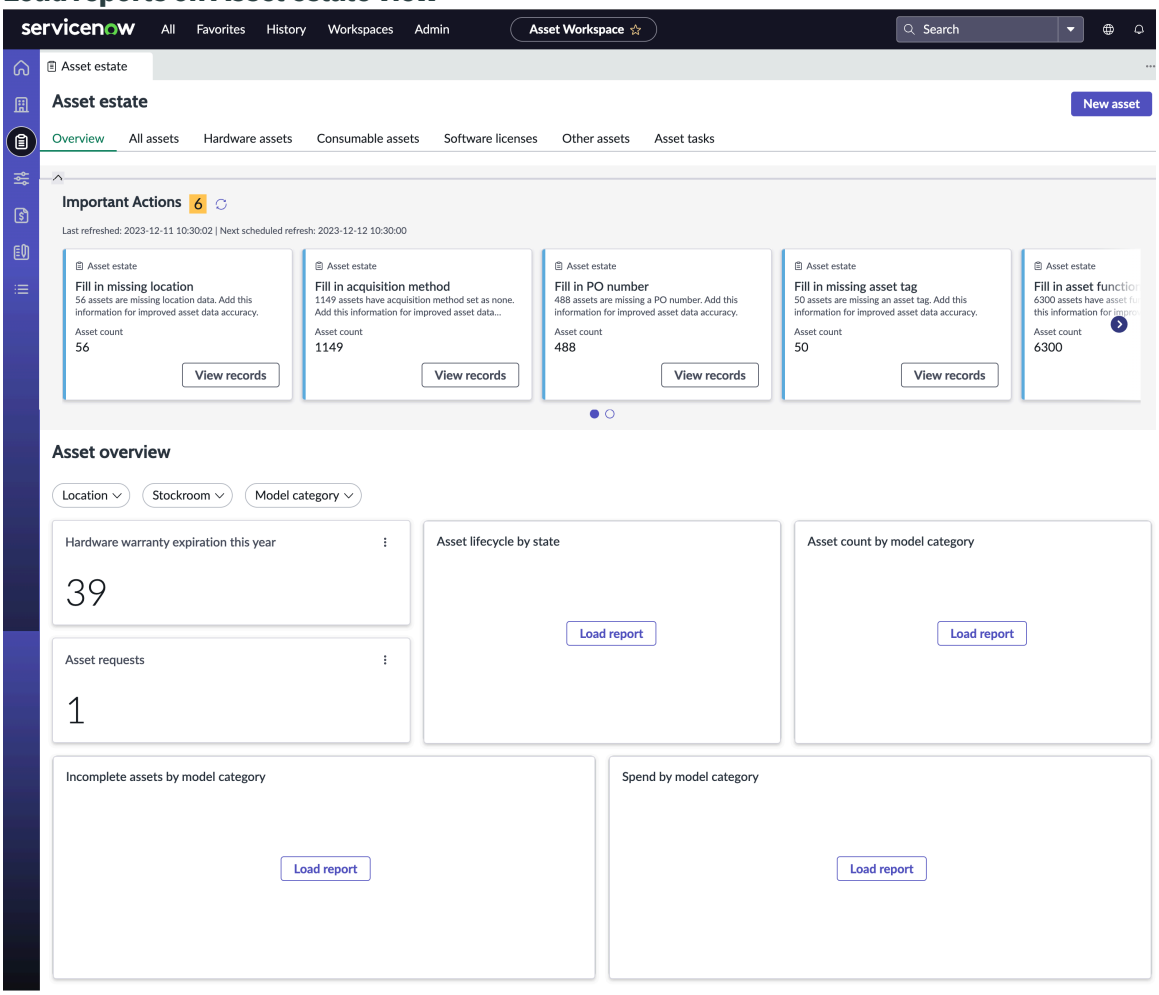
Load reports on Asset estate view

You can load charts or widgets that fetch a huge set of asset records on demand instead of loading them along with the page. This approach enables you to reduce the loading time for the Asset estate view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The system property *sn_itam_workspace.asset_estate_enable_lazy_loading* provides you with an option to either selectively load reports you want to view or load reports concurrently with the page. By default, this system property is set to **False**. When this system property is enabled on your ServiceNow instance, you can view charts or widgets by using the **Load report** option.

Load reports on Asset estate view



Exclude Install Base Item (IBI) assets from reports

Any item that is provided as a service or sold to your customer is tracked as an Install Base Item (IBI). The Model category table associates Asset class, CI class, and Install Base Item (IBI) class.

By default, the reports and Important Actions in the Asset estate view include all the assets in the Asset [alm_asset] table. However, you can filter IBI assets from reports and Important Actions cards. For details on configuration required to filter IBI assets, see the Sold products exclusion from the reports and Important Actions of Asset Workspace [KB1584331] article in the Now Support Knowledge Base

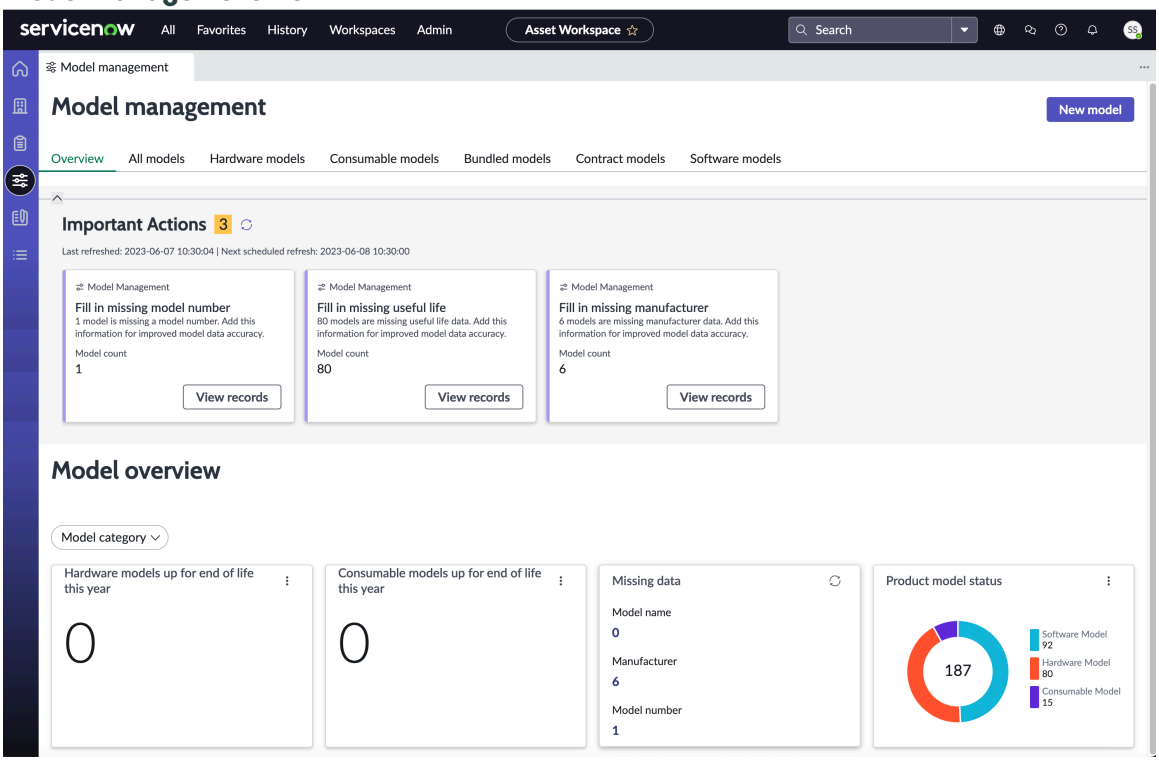
Model management view

Use the Model management view in the Asset Workspace to create or modify models and manage asset model-related functions. Track hardware and consumable models nearing end of life.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Software model tab is hidden when Software Asset Management (com.snc.software_asset_management) or Software Asset Management Professional (com.snc.pa.samp) is active. You can view this Software model tab in Software Asset Workspace.

Model management view



Model overview

Widget or chart	Description
Hardware models up for end of life this year	Count of hardware models whose start date of the end of life phase is the current year.
Consumable models up for end of life this year	Count of consumable models whose start date of the end of life phase is the current year.
Missing data	Count of models that have missing model name, manufacturer, and model number.
Product model status	Current count of hardware, consumable, and software models based on the status of the models.

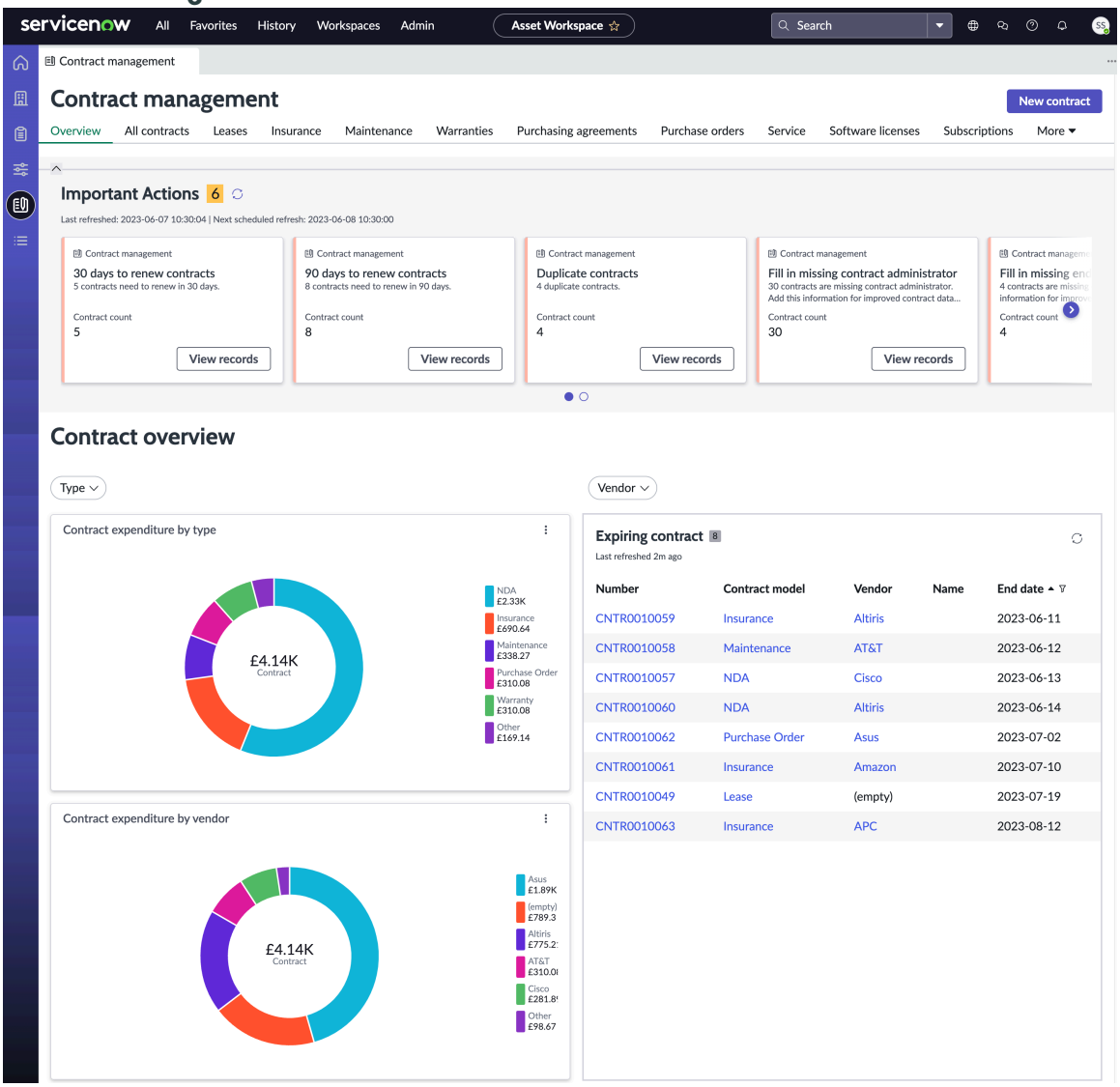
Contract management view

Use the Contract management view in the Asset Workspace to view and manage details of contracts such as Contract number, Contract start and end dates, terms and conditions statements.

The Contract management view includes important actions for managing your contract, contract expenditure by type and vendor, and the list of expiring contracts.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Contract management view



Asset and CI management

Asset and configuration item (CI) management refers to creating assets, setting appropriate states and substates, synchronizing assets and CIs, managing consumables, and retiring assets.

Relationship between asset and CI

It's important to manage the relationship between assets and associated CIs. Assets are tracked with the Asset Management application, which focuses on the financial aspects of owning property. Configuration items are stored in the CMDB, which is used to track items and make them available to users.

When an asset has a corresponding configuration item, the asset record and the configuration item record are kept synchronized with two business rules.

- *`Update CI fields on change`* (on the Asset [alm_asset] table)
- *`Update Asset fields on change`* (on the Configuration Item [cmdb_ci] table)

Note: Assets and CIs can be synchronized only if they're logically mapped.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

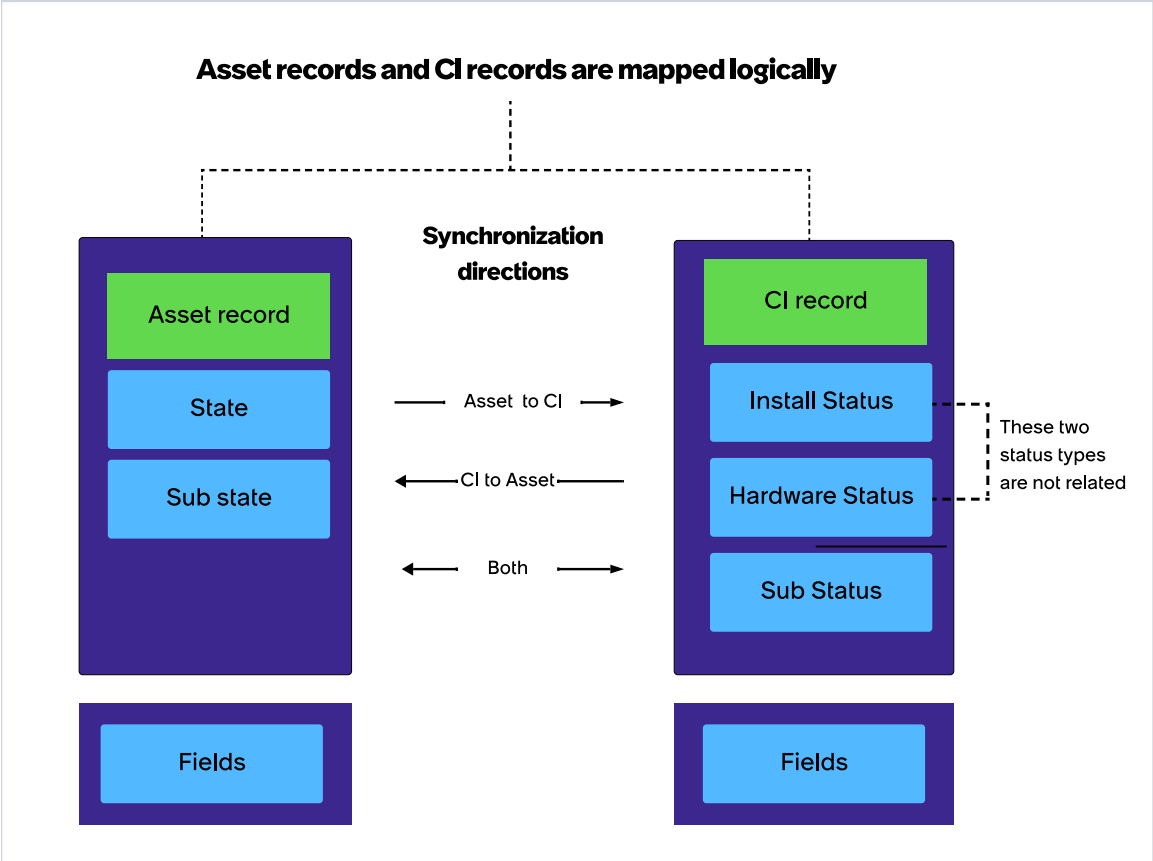
Asset-CI mapping and synchronization

The State field of asset record and Status field of CI record are synchronized so that changes made on one form trigger the same update on the corresponding form, ensuring consistent reporting.

Note: The ServiceNow AI Platform synchronizes updates between assets and configuration items only if the asset and configuration item are pointed toward each other.

The following diagram illustrates the concept of Asset-CI mapping and synchronization.

Overview of Asset-CI mapping and synchronization



This synchronization and mapping is based on the following factors:

- Asset state and CI status aren't mapped on one-to-one basis. Rather they're mapped to the most logical counterpart on the other table. For example, for a hardware asset set to state **In Stock - Pending disposal**, the corresponding CI is set to **In Disposition** with no substate.
- This synchronization happens between the asset's State field and the following CI fields:
  - Install Status field: Install Status doesn't have a sub status and must be used for non-hardware CIs.
  - Hardware Status and Sub status field: Hardware Status is visible only for Hardware CI.
- Drive changes by updating the state on the Asset form. The Asset-CI synchronization can be driven in the following ways:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

  - Asset to CI synchronization: Change to the asset's status updates the logically mapped CI's Install Status or Hardware Status and sub status.
  - CI to Asset: Change to the CIs Install Status or Hardware Status updates the logically mapped asset's states and sub states.
- For a CMDB hardware CI, if both Hardware Status and Install Status is updated, the Hardware Status change is considered for mapping the corresponding state of the asset.
- CIs Install Status and Hardware Status work independently, so the two fields aren't related. CI's Hardware Status change doesn't change CIs Install Status and vice versa. To avoid confusion, keeping both status for CMDB CI Hardware isn't recommended.

List of the fields that get synced between Asset and CI

When changing any of the following fields on the asset or CI record, the same field on the corresponding record is automatically updated (except for the **Cost** field, which is informational-only on the CI record).

The following is a list of fields that are synchronized.

- Asset tag
- Assigned
- Assigned to
- Checked in
- Checked out
- Company
- Cost (synchronizes in only one direction: asset to CI)
- Cost center
- Delivery date
- Department
- Due in
- Due
- GL account
- Install date
- Invoice number
- Justification
- Lease id
- Location
- Managed by
- Model (model_id in CI)
- Order date
- Order received
- Ordered
- Owned by
- PO number

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Purchase date
- Purchased
- Serial number
- Support group
- Supported by
- Vendor
- Warranty expiration

Asset, CI, and IBI synchronization

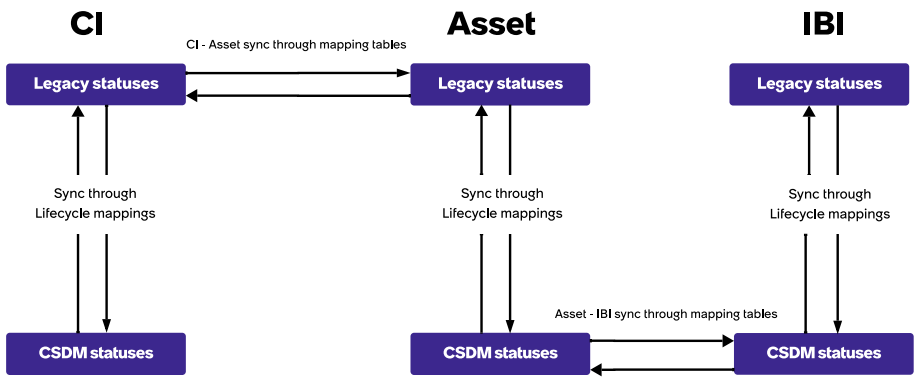
Any item that is provided as a service or sold to your customer is tracked as an Install Base Item (IBI). The Model category table associates Asset, CI, and Install Base Item (IBI). The synchronization between the asset and IBI is through the CSDM Life Cycle Stage and Status fields.

When the CSDM (csdm.lifecycle.migration.activated) plugin is activated on your ServiceNow instance, synchronization of the CSDM Lifecycle fields between the asset and CI depends on the *csdm.lifecycle.sync.between.ci.and.asset.activated* system property. If you are upgrading to the Xanadu release, this system property is set to **false** by default. Synchronization between the asset and CI happens in one of the following ways:

- When the system property is set to **false**, synchronization of the CSDM Lifecycle fields is through the legacy State and Substate fields.
- When the system property is set to **true**, the CSDM Life Cycle Stage and Status fields are directly synchronized.

Note: If you are activating the CSDM (csdm.lifecycle.migration.activated) plugin on your ServiceNow instance for the first time, and you have custom States and Substates for the asset or CI, then make sure to configure mapping between the legacy fields and the CSDM Lifecycle fields. For more information, see Enabling life-cycle synchronization from legacy to asset.

Asset, CI, and IBI synchronization when the csdm.lifecycle.sync.between.ci.and.asset.activated system property is set to false



Synchronization of updates from asset to IBI and CI

Updates made to the State or Substate field of an asset are synchronized with the associated IBI and CI. For example, when the State field of the asset is updated to In use, synchronization happens as follows.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The Life Cycle Stage and Life Cycle Stage Status of the asset are set to Operational and In use, these field values are then synchronized with Stage and Status fields of IBI asset.
- The Status and Substatus fields of the CI change to Installed and In use.

Synchronization of updates from IBI to asset and CI

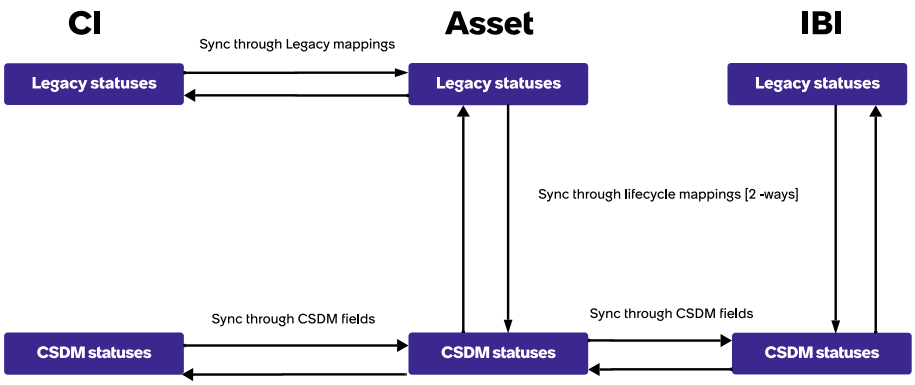
Updates made to the Life Cycle Stage and Life Cycle Stage Status fields of an IBI asset are synchronized with the legacy State and Substate fields of the asset through the CSDM fields. The legacy fields of the asset are then synchronized with the associated CI. For example, when the life Life Cycle Stage and Life Cycle Stage Status fields of an IBI asset are updated to Defective and In Stock, synchronization happens as follows.

1. The Life Cycle Stage and Life Cycle Stage Status of the asset change to In Stock and Defective. These field values are synchronized with the State and Substate fields of the asset.
2. The State and Substate fields of the asset are then synchronized with the corresponding fields of the associated CI.

Synchronization of updates from CI to asset and IBI

Updates made to the Status and Substatus fields of a CI are synchronized with the corresponding fields of the asset. The legacy fields of the asset are then synchronized with the Life Cycle Stage and Life Cycle Stage Status fields of the IBI asset through the CSDM fields. For example, when the Status and Substatus fields of a CI are updated to Retired and Donated, the corresponding fields of the asset change. The changes from the asset are synchronized with the IBI asset and the Life Cycle Stage and Life Cycle Stage Status fields change to End of Life and Retired.

Asset, CI, and IBI synchronization when the csdm.lifecycle.sync.between.ci.and.asset.activated system property is set to true



Synchronization of updates from asset to CI and IBI

Updates made to the legacy State and Substate fields of the asset are synchronized between the asset and CI as follows:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The Life Cycle Stage and Life Cycle Stage Status fields of the asset are updated with values corresponding to the legacy State and Substate fields of the asset.
- The State and Substate fields of the asset are then directly synchronized with the corresponding legacy fields of the associated CI.
- The Life Cycle Stage and Life Cycle Stage Status fields of the asset are then directly synchronized with the corresponding CSDM fields of the associated CI.

However, synchronization of updates from asset to IBI is only through the CSDM Lifecycle fields.

Synchronization of updates from IBI to asset and CI

Updates made to the Life Cycle Stage and Life Cycle Stage Status fields of the IBI are synchronized as follows:

- The legacy State and Substate fields of the asset are synchronized through the CSDM fields.
- The legacy fields of the asset are synchronized with the legacy fields of the associated CI.
- The Life Cycle Stage and Status fields of the asset are directly synchronized with the corresponding CSDM fields of the associated CI.

Synchronization of updates from CI to asset and IBI

Updates made to the Life Cycle Stage and Status fields of a CI are synchronized as follows:

- The Life Cycle Stage and Status fields of the CI are directly synchronized with the corresponding CSDM fields of the asset.
- The legacy fields of the asset are then updated with the values corresponding to the CSDM fields.
- The legacy fields of the asset are then synchronized with the corresponding fields of the CI.
- The legacy fields of IBI are synchronized with the asset through the CSDM Lifecycle fields.

Asset and CI creation properties

glide.create_alm_asset.async

The system property *glide.create_alm_asset.async* controls whether assets are created immediately when a configuration item (CI) is created, or are created after a delay. A delay in asset creation enables large numbers of CIs to be created quickly. When this property is set to **true**, assets are created by the *Asset - Create asset delayed sync* scheduled job that runs every 15 minutes. View the status of the scheduled job in the Asset Job Log table [asset_job_log]. To view assets waiting to be created and asset creation errors, navigate to **Asset** > **Administration** > **Asset Creation Queue**. To reprocess an error, update the state from **Error** to **Ready**. The next time the scheduled job runs, it reattempts to create the asset.

When the *glide.create_alm_asset.async* property is set to **false**, assets are created immediately from CIs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If you upgrade to Brazil from Orlando or earlier, the default value of this property is **false**. Before updating this property, review your processes that depend on an asset value present on a CI and make any necessary changes to account for delayed asset creation.

glide.asset.create_ci_with_ire

The system property *glide.asset.create_ci_with_ire* enables CIs to be created from assets using the ServiceNow® Configuration Management Database (CMDB) Identification and Reconciliation engine (IRE). This property affects CI classes that have an identification rule on serial number and have no dependent relationships with other CI classes.

Note: This property is applicable to CI classes that are extended from the hardware CI class [cmdb_ci_hardware].

CIs created with the IRE are named using the format `Serial number - Model name` and the source is SNAssetManagement. The **Serial number** field is required on assets with model categories that correspond to these CI classes. Asset creation fails if its serial number is present on an existing CI or asset. The **Serial number** field is also required to receive purchase order line items for model categories that correspond to these CI classes. The **Serial number** field isn't required to create pre-allocated assets, but the serial number must be provided when the asset is allocated.
The default value of this property is false if you upgrade to Brazil from Orlando or earlier. Before updating this property, review the customizations on the Serial number field and any integrations or flows that use an existing serial number to create an asset.

Other Asset and CI system properties

sn_itam_enable_cache_for_asset_ci_mapping

The asset and CI fields are synchronized based on the mappings defined in the relevant mapping tables. Fetching these mappings on the update of an asset or CI has an impact on the performance. The *sn_itam_enable_cache_for_asset_ci_mapping* system property enables you to cache the following mappings:

- Asset and CI fields
- Asset state and CI install status
- Asset state and CI hardware status

Unless there isn't any change in the mapping tables, these cached mappings are fetched during the synchronization resulting in the improved system performance.

sn_itam_common.mac_address_sync

The *sn_itam_common.mac_address_sync* system property enables you to synchronize asset and CI using the Mac address. By default, this system property is set to **false**. To enable synchronization through the Mac address, set the value of this system property to **true** in the Asset Property [asset_property] table.

Asset read access system property

sn_itam_restrict_asset_read

The *sn_itam_restrict_asset_read* system property controls read access to the Asset (alm_asset) table and its child tables for users with only the snc_internal role. When set to **true**, these users can only read asset records

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

assigned to them or where they are referenced in fields such as Reserved for, Managed by, or Owned by. Users with any additional role retain full read access. By default, this system property is set to **False**.

CMDB success advisor for HAM

Use CMDB success advisor for Hardware Asset Management (HAM) to monitor and improve hardware asset data quality in the CMDB. The advisor dashboard provides insights into data coverage, attribute completeness, and recommended data integrations for your hardware asset model categories. For more information, see Using CMDB success advisor for HAM.

Example Asset Management process

The best method for managing assets depends on business needs and how your business is organized.

Before you begin

Role required: asset

About this task

These steps are one possible process for getting started with Asset Management.

Procedure

1. Identify assets in your system.

   A key component of asset management is the initial and ongoing inventory or discovery of what you own. The ServiceNow platform provides the following options for asset discovery.

   - The separate, robust Discovery tool.
   - For organizations that want to use the discovery technologies they have deployed already, such as SMS, Tally NetCensus, LanDesk, or others, ServiceNow can support integration to those technologies via web services. Scanned data can be mapped directly into the Configuration Management Database (CMDB).

2. Clean up information in the CMDB.
   Remove information that is obsolete or invalid. Ensure that all remaining information is accurate and complete. Add any necessary information.
3. Create categories of asset models such as computers, servers, printers, and software.
4. Create asset models.
   Models are specific versions or various configurations of an asset, such as a MacBook Pro 17".
5. Create individual assets, such as hardware, consumables, and software licenses.
   If you used a discovery tool, you may already have many assets identified accurately.
6. Manage assets by counting software licenses, viewing assets that are in stock, setting asset states and substates, and analyzing unallocated software.

Using Base Asset Management

Use the Base Asset Management application to manage your assets efficiently.

Work with Asset and CI

Asset and configuration item (CI) management refers to creating assets, setting appropriate states and substates, synchronizing assets and CIs, managing consumables, and retiring assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create assets

Create hardware, software, consumable, bundle, pallet, mobile, and facility assets using the Core UI or the Hardware Asset Workspace.

Before you begin

Role required: asset

About this task

Unique identifiers for assets

When you create an asset that belongs to a model category linked to a CI class with identification rules defined for fields like the Asset tag, Serial number, or MAC address, you should provide details for at least one of these fields. The identification rules for a CI class are defined in the CMDB Identification and Reconciliation engine (IRE). For more details, see Identification rules and Create a CI identification rule. These rules help to uniquely identify the asset through these required fields and maintain accurate asset records. However, specifying the values for these fields is optional in the following scenarios:

- When you are creating an asset that belongs to a model category without a CI class.
- When you are creating an asset that belongs to a model category linked to a CI class without any identification rules defined.

Procedure

1. Create an asset.

Interface	Action
Core UI	**a.** Navigate to **All** > **Asset** > **Portfolios** > **All Assets**. **b.** Select the type of asset that you want to create. **c.** Select **New**.
Hardware Asset Workspace	**a.** Navigate to **All** > **Hardware Asset Workspace** > **Asset estate**. **b.** Select **New Asset**. **c.** In the dialog box, select the asset type and then select **Create**.

2. On the Asset record fields form, fill in the fields.

   For a description of the field values, see Asset record fields.

3. Submit or save the asset form.

Retire assets

You can retire an asset at any time.

Before you begin

Role required: asset

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

After you change the state of an asset to **Retired**, the **Substate** field is active. When you retire an asset, the status of related CIs also changes to **Retired**. Selecting a substate is not required, but can be helpful for tracking and reporting.

Note: When you manually change the state of the asset from **Retired** to any other value such as **In use** the asset becomes active again.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **All Assets**.
2. In **State**, select **Retired**.
3. **Optional:** In **Substate**, select **Disposed**, **Sold**, **Donated**, or **Vendor Credit**.
4. Click **Update**.

Delete assets

You can delete an asset at any time.

Before you begin

Note: If an asset is a part of an asset bundle, the asset cannot be deleted.

Role required: asset

About this task

A confirmation must be accepted before the asset and components are permanently deleted. If a CI and asset are linked, deleting one also deletes the other.

Only delete an asset to clean up errors. For tracking purposes, the correct method for managing an asset that is no longer in use is to change the state of the asset to **Retired**.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **All Assets**.
2. Select the check box to the left of the asset **Name**.
3. In the **Actions** choice list below the list, select **Delete**.

Map asset and CI fields

When you map the asset and CI fields, synchronization happens both ways. Changes to either the asset or CI record are updated to the logically mapped record. You can synchronize custom mappings and mappings provided with the base instance.

Before you begin

Role required: admin or asset

Note: If you upgraded from a prior release and customized the `AssetAndCISynchronizer` script include before the upgrade, you must overwrite the customization and then recreate the custom mappings.

About this task

You can conditionally map the fields for synchronization. For example, you can map the Location field only for a hardware asset and not for a software asset. So when an asset is updated, the **Location** field is synchronized only for the hardware asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: You can't map the asset and CI fields if the asset value is present only in the Hardware [alm_hardware] table and not in the Asset [alm_asset] table.

Procedure

1. Navigate to **All** > **Asset** > **Administration** > **Asset-CI Field Mapping** and click **New**.
2. From the **Asset field** list, select the field.
   This list refers to the alm_asset table.
3. Select the logically associated field from the **Configuration Item field**list that refers to the cmdb_ci table.
4. To create conditions for the mapping, click the **Advanced view** related link.
   - To specify conditions for synchronizing the asset field with the CI field, use the **Asset mapping condition** builder.
   - To specify conditions for synchronizing the CI field with the asset field, use the **Configuration Item mapping condition** builder.
5. Select the **Active** check box to activate the mapping.
6. Select **Submit**.

Map asset state and CI install status

Map the asset **State** and **Substate** fields to the **CI Install Status** field. The **Substatus** field of the **CI Install Status** field should not be used for hardware CIs.

Before you begin
Role required: admin or asset

Note: If you upgraded from a prior release and customized the `AssetAndCISynchronizer` script include before the upgrade, you must overwrite the customization and then recreate the custom mappings.

About this task
Asset synchronization does not update this field when hardware assets are updated. When you create the mapping, you can set the synchronisation direction from Asset to CI, but not from CI to Asset. For non-Hardware CI classes, you can set the synchronisation in both the directions.

Procedure

1. Navigate to **All** > **Asset** > **Administration** > **Asset-CI Install Status Mapping**.
   By default, only custom mappings display. The list of mappings uses the filter condition of **[Out of the box] [is] [False]**.
2. Click **New**.
3. From the **Asset State** list, select the state you want to map.
4. **Optional:** If available, select a substate from the **Asset Substate** list.
   Some of the asset states do not have a substate.
5. From the **Configuration Item Status** list, select the logically associated CI status you want to map.
6. From the **Sync direction** list, select the direction you want to drive the synchronization.
7. Select the **Active** check box to activate the mapping.
8. Click **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Map asset state and CI hardware status

Map the asset **State** and **Substate** fields to the **CI Hardware Status** field. Don't use the **Substatus** field on hardware CIs because the CI synchronization does not update the field when assets are updated. When you create the mapping, you can set the synchronization direction from the asset, CI, or both.

Before you begin

Role required: admin or asset

Note: If you upgraded from a prior release and you've customized the *AssetAndCISynchronizer* script before the upgrade, overwrite the customization and then recreate the custom mappings.

About this task

The **Install Status** and **Hardware Status** fields of a CI are independent of each other. There is no correlation between them. A change to the **Hardware Status** field does not change the **CI Install Status** field and vice versa.

Procedure

1. Navigate to **All** > **Asset** > **Administration** > **Asset-CI Hardware Status Mapping**.
   By default, only custom mappings display. The list of mappings uses the filter condition of **[Out of the box] [is] [False]**.
2. Click **New**.
3. From the **Asset state** list, select the state you want to map.
4. **Optional:** If available, select a substate from the **Asset substate** list.
   Some of the asset states do not have a substate.
5. From the **Configuration Item status**list, select the logically associated CI state you want to map.
6. **Optional:** If available, select a substate from the **Configuration Item substatus** list.
   Some of the CI statuses do not have a substatus.
7. From the **Sync direction** list, select the direction you want to drive the synchronization.
8. Select the **Active** check box to activate the mapping.
9. Click **Submit**.

Manage various assets through asset classes

The default asset classes are Hardware, Software License, Consumable, Bundle, Software Entitlement, and Facility. These general classes can be used to manage various assets.

If the general classes that are provided aren't appropriate for a specific group of assets, consider creating a new asset class. For example, a fleet of cars could be tracked in a custom asset class named Vehicle. Before creating new asset classes, analyze business needs to see if the general classes can be used. Managing a lot of asset classes can be difficult to maintain.

Built-in functionality allows you to use asset classes for financial tracking, in a model bundle, and as a pre-allocated asset.

Create an asset class

Creating an asset class requires defining a new table and creating a corresponding application and module, then adding the new asset class to new or existing model categories. The default asset classes are Hardware, Software License, and Consumable. These general classes can be used to manage various assets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: asset or category_manager

About this task
If the general classes aren't appropriate for a specific group of assets, consider creating an asset class. For example, a fleet of cars could be tracked in a custom asset class named Vehicle. Before creating asset classes, analyze business needs to see if the general classes can be used. A large number of asset classes can be difficult to maintain.

Built-in functionality allows you to use asset classes for financial tracking, in a model bundle, and as a pre-allocated asset.

Ensure that the model categories contain models. Use the Table form to extend an existing table.

Procedure
1. Navigate to **All** > **System Definition** > **Tables & Columns** > **Create Table** and fill out the Table form fields with information on the new table.

Field	Description
Label	Display name of table that can be localized. For example, a custom asset class to track a fleet of cars can be labeled as Vehicle.
Name	Internal name of table that can't be changed later. For example, the Vehicle asset class can be named alm_u_vehicle.
Extends table	Table that new table inherits fields from. The Asset (alm_asset) table can be extended to create a custom asset class.
Application	Application that uses the record.
Create module	Check box for creating a module.
Create mobile module	Check box for creating a mobile module.
Add module to menu	Menu that module displays.
New menu name	New menu name.

2. Click **Submit**.
3. Navigate to the new application (for example, **Asset** > **Vehicle**) and click **New**.
4. Configure the form to include **Model**, **Model Category**, and **Quantity**.
5. Create a model category and add the asset class you created to the **Asset class** field.
6. Create models and add them to the model category.

What to do next
Now that the model category (associated with the new asset class) and the models are created, manage the models as assets. For example, use the model in a bundle.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create license assets

You can manage your organization's software license assets.

Before you begin
Role required: sam

About this task
Examples include a license to use a single copy of a desktop software program and an enterprise license to install a software program on multiple computers.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **License Assets** and click **New**.
2. In the **Rights** field, type the number of entitlements to be granted by this license.
3. Complete the form as described in Create assets.

Set asset states and substates

Use asset states and substates to track assets accurately and at a detailed level.

Before you begin
Role required: asset

About this task
Good asset information helps you with reporting, controlling assets, and lowering costs. For example, recording missing items using the **State** and **Substates** fields enables you to run reports and analyze the information. You can use this information to lower costs.

Tip: You shouldn't modify state values. If the state values are supported and defined by the process, you can modify substates.

Some of the substate values are available with more than one state. For example, the substate **Pending disposal** is available with the state **In stock**, **In transit**, and **Retired**. The combination of the **State** and the **Substate** fields provide the correct asset tracking information. For example, an asset that is **In stock** and **Pending disposal** indicates that the asset is no longer used and is in the stockroom waiting to be disposed of.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **All Assets**.
2. Select an asset.
3. Edit the **State** and **Substate** fields.

Asset states and substates definitions

State	Available substates	Notes
On order	None	Asset is ordered but isn't received.
In stock	○ Available: Asset is available for use. ○ Reserved: Asset is reserved for a user who requested it through a sourcing request.	Asset is stored in a stockroom. Substate indicates if the asset can be put to use.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

State	Available substates	Notes
	○ Defective: Asset is faulty or inoperative. ○ Pending repair: Defective asset is marked for repair by the vendor. ○ Pending install: Asset is yet to be installed. ○ Pending disposal: Asset is marked for disposal because it's no longer required in the stockroom. ○ Pending transfer: Asset is being planned to be transferred through a transfer order. ○ Pre-allocated: Asset is ready to be allocated but isn't a financial liability until it's allocated to a user. ○ On hold: Asset isn't ready to be used because it's awaiting something. For example, necessary documentation is pending. ○ Legal hold: Asset is kept on hold because of some legal reasons. ○ Quarantine: Asset is kept in isolation in the stockroom. ○ Pending fulfillment: Asset is functional but awaiting business conditions such as billing and signoff. ○ Pending certificate: Asset is awaiting certificate for disposal. ○ Pending return: Asset that is leased is yet to be returned. ○ Test: Asset is in the testing phase and not yet operational. ○ End of support: Asset is no longer provided any support through incidents or contracts. ○ Pending Retirement: Asset has reached the end of life	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

State	Available substates	Notes
	and can be sold, disposed, or donated. ○ Pending resale: Asset is awaiting resale. ○ Pending evaluation: Asset is yet to be evaluated or assessed to confirm if it can be used.	
In transit	○ Available: Asset is available for use. ○ Reserved: Asset is reserved for a user who requested it through a sourcing request. ○ Defective: Asset is faulty or inoperative. ○ Pending install: Asset is yet to be installed. ○ Pending disposal: Asset is marked for disposal because it's no longer required in your stockroom. ○ Pending donation: Asset is marked for donation because it's no longer required in your stockroom. ○ Pre-allocated: Asset is ready to be allocated but isn't a financial liability until it's allocated to a user. ○ Pending resale: Asset is awaiting resale.	Asset is being transported.
In use	○ Pending fulfillment: Asset is functional but awaiting business conditions such as billing and signoff. ○ End of support: Asset isn't provided any support services. ○ Pending retirement: Asset is marked for retirement because it's no longer in service. ○ None	Asset is in use. This option is available for non-consumables only.
In maintenance	None	Asset is being repaired or undergoing maintenance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

State	Available substates	Notes
Retired	○ Disposed: Asset is disposed because it has reached end of life. ○ Pending disposal: Asset is marked for disposal because it's nearing the end of life. ○ Sold: Asset is sold. ○ Donated: Asset is donated to charity organization through asset donation orders. ○ Vendor credit: Old faulty asset is returned to the vendor for a replacement asset through Return Merchandise Authorization (RMA). ○ Lease return: Leased hardware asset is returned before the expiry of contract. ○ Obsolete: Asset is obsolete and should be disposed. ○ RMA: Faulty asset is returned to or replaced by the vendor through Return Merchandise Authorization (RMA). ○ Buy out: Leased hardware asset is bought before the expiry of contract. ○ Pending resale: Asset is awaiting resale.	Set the asset to a Retired state when the asset has reached the end of life. Only delete asset records if they were created erroneously.
Missing	○ Lost ○ Stolen	An asset that is missing or lost.
Build	None	Asset is being prepared. This state is used during the creation of an asset bundle. **Note:** Hardware and consumables don't have a Build state.

Add depreciation to an asset

Depreciation is the reduction in the value of an asset over time.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: asset

About this task
A depreciation schedule can be added to hardware assets. Based on the information specified in the asset record, the ServiceNow AI Platform calculates the depreciation amount daily using the **Calculate Depreciation** scheduled job. The *sn_itam_trigger_depreciation_job_after_days* system property determines when the **Calculate Depreciation** scheduled job calculates the depreciation amount.

Important: The depreciation fields on the asset, such as Depreciated amount, Residual value, and Residual date are updated daily by the *Calculate Depreciation* job. If you plan to enable audit logging in these fields, it logs every change daily. This process could result in a large volume of audit entries, which might impact storage and log management.

The ServiceNow AI Platform calculates the read-only **Residual date** and **Residual value** fields based on the **Cost**, **Depreciation**, and **Depreciation effective date** fields. For example, if the asset **Cost** is $1000.00, the **Straight Line** depreciation method is selected, and exactly two years have passed, the **Residual value** would be $500.00.

When an asset is in the **In Use** state, the asset form populates a Deprecation effective date.

For more information about fixed assets and depreciation, see Using Depreciation with Fixed Assets.

Procedure
1. Navigate to **All** > **Asset** > **Portfolios** > **Hardware Assets**.
2. Select an asset.
3. Fill in the **Depreciation**, **Depreciation effective date**, **Salvage Value**, and **Covered by fixed asset** fields as described in Create assets.
   Consider these points.
   - If the depreciation effective date is in the future, depreciation is 0 and the current residual value is the original purchase price. The system doesn't begin to calculate depreciation until the effective date is reached.
   - The salvage value must be less than or equal to the asset cost. If a salvage value greater than the cost is entered, a warning message appears and the record can't be saved.
4. Select and hold (or right-click) the header and select **Save**.
5. Select **Calculate Depreciation**.
   The **Residual date**, **Residual value**, and **Depreciated amount** fields are automatically calculated.

Create fixed assets

Fixed assets are containers that can hold multiple assets. Fixed assets are commonly tracked at the corporate level by a finance or accounting department, but may contain IT assets such as hardware and software.

The **Fixed Asset** option in the Cost application shows the IT assets related to a fixed asset record. This link can help IT stay coordinated with the corporate asset system. Users with the financial_mgmt_admin and financial_mgmt_user roles can create fixed assets. After creating a fixed asset and adding assets, the residual value can be automatically calculated.

To create a fixed asset:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

1. Navigate to **Cost** > **Fixed Assets**.
2. Click **New**.
3. Enter a name for the fixed asset.
4. Click **Submit**.

To add assets to a fixed asset:

1. Navigate to **Cost** > **Fixed Assets**.
2. Click a fixed asset.
3. In the **Covered assets** related list, click **Edit**.
4. In the **Collection** list, double-click an asset to add it to the **Covers Assets List**.
5. Click **Save**.

To sum the residual values of all assets in a fixed asset:

1. Navigate to **Cost** > **Fixed Assets**.
2. Click a fixed asset.
3. Click **Sum Residual Value**.

   The ServiceNow platform calculates the**Residual Value**, **Total cost,** and **Total depreciation** based on information in the **Financial** and **Depreciation** sections on the individual asset records.

Use depreciation with fixed assets

You can calculate depreciation for a fixed asset using a choice of depreciation schedules. Calculating depreciation for a fixed asset can help IT coordinate with the corporate fixed asset system to report correct valuation and book value.

Before you begin

Role required: financial_mgmt_admin or financial_mgmt

About this task

When creating a new depreciation schedule, select the **Declining Balance** or **Straight Line** depreciation **Category**. The two categories depreciate an asset by the same overall amount during the asset life cycle, but do so on different schedules.

- **Declining Balance**: depreciates an asset by a greater amount in earlier accounting periods than in later periods.
- **Straight Line**: depreciates an asset by an equal amount each accounting period.

The following example shows depreciated value on a $10,000.00 asset over five years using the two different methods.

Using depreciation with fixed assets

Year	Declining balance	Straight line
1	$5000.00	$8000.00
2	$2500.00	$6000.00
3	$1250.00	$4000.00
4	$625.00	$2000.00

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Using depreciation with fixed assets (continued)

Year	Declining balance	Straight line
5	$0	$0

Procedure

1. To view a depreciation schedule, navigate to **Financial Management** > **Depreciation** and click the **Category**.
2. To create a new depreciation schedule, click **New**.
3. Enter a **Name**.
4. Select a **Category**.
5. Add a **Script** to calculate depreciation value.
6. Click **Submit**.
   The depreciation schedule is now available in the **Depreciation** field on the asset record.

Consumables life cycle

Consumables are assets that are not tracked individually, but as a group of the same model.

The group of consumables has one or more of the following traits.

- Same location
- Same state
- Consumed by the same asset, typically as accessories or parts

Some common consumable assets include mouse devices, computer keyboards, and pencils. The base ServiceNow system includes the **Consumable** model category. The first step in working with models is to create a model within the model category for an individual consumable asset. Items such as monitors, keyboards, and mouse devices are often tracked as consumables. Consumables cannot be pre-allocated.

Consumable assets are stored in the Consumable [alm_consumable] table. Consumables follow a slightly different life cycle from other assets.

Stages of consumables

The consumable lifecycle stages are as follows.

- On order
- In stock
- In transit
- Consumed
- In maintenance
- Retired
- Missing

View consumable assets

Consumables are tracked as a group of the same model, but you can view individual consumables in the consumable model record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: model_manager

Procedure
1. Navigate to **All** > **Product Catalog** > **Product Model** > **Consumable Models**.
2. Open a consumable model record.
3. View individual consumables in the **Consumables** related list.

Create consumable assets
Create a consumable to track an asset as a group of the same model.

Before you begin
Role required: asset

Procedure
1. Navigate to **All** > **Asset** > **Portfolios** > **Consumables** and create a new record (see table for field descriptions).

Consumable record form

Field	Description
Display name	Name of the asset.
Model category	Model category that controls if an asset is linked to a CI.
Model	Product model of the asset.
Quantity	Amount of items the asset represents.
General	
State	State of the asset.
Parent	Parent asset. When a parent asset is defined, the **Assignment** and **State** fields of the child asset are automatically populated based on the **Assignment** and **State** fields of the parent asset and are read-only.
Class	Type of asset. The system automatically sets the **Class** to **Consumable**.
Expenditure type	The type of expenditure. Choose from the following options: ○ **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. ○ **Opex**: Operational expenditure is an on-going expenditure. For example, toners for the photocopier.
Substate	Substate of the asset.
Location	Location of the asset.
Cost	Price that the asset was purchased for.
Cost Center	Cost center financially responsible for the asset.
Disposal	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Disposal order number	A unique number assigned to the asset disposal order. **Note:** This field appears only if you have installed Hardware Asset Management from the ServiceNow Store.
Disposal vendor	The vendor assigned to carry out the asset disposal order. **Note:** This field appears only if you have installed Hardware Asset Management from the ServiceNow Store.
Vendor disposal order ID	Order number assigned by the vendor assigned to carry out the asset disposal order. **Note:** This field appears only if you have installed Hardware Asset Management from the ServiceNow Store.
Disposal date	The date when the asset disposal order process is completed. **Note:** This field appears only if you have installed Hardware Asset Management from the ServiceNow Store.
Disposal reason	Text explaining why the asset is being retired.
Beneficiary	Organization that receives the asset when it is retired.
Resale price	Value of the asset when it is retired. For example, if the asset is donated, the value used when reporting taxes.
Scheduled retirement	Scheduled date on which the asset is retired.
Retired date	Actual date on which the asset was retired.
Activities	
Work Notes	Work notes related to the asset.

2. Click **Submit**.

Consume consumable assets

To consume consumable assets, they must have a state of **In Stock** and a substate of **Available**.

Before you begin

Role required: itil, asset, or itil_admin

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **Consumables**.
2. Select the **Display Name** of a consumable asset with a state of **In Stock** and a substate of **Available**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Select **Consume**.
4. Enter the **Quantity** to consume.
5. In **Asset**, select the lookup icon and select the asset associated with the consumable.

   Example
   For example, a mouse tracked as a consumable asset can be associated with a non-consumable asset such as a computer.
6. In **User**, select the lookup icon and select a user associated with the consumable.
7. Select **OK**.
   On the **Consumable** form, the **Quantity** field shows the reduced number. The Consumables list contains two records for the consumable in the specific stockroom: one with a state and substate of **In Stock** and **Available** (if you did not consume the entire quantity), and one with a state of **Consumed**. If a consumable is not in the process of being transferred to a different stockroom and information in the data record is the same, similar records merge automatically. After a consumable is consumed, the record remains in the system for reporting purposes.

Return consumable assets to stockrooms

Move a consumable asset that is in a consumed state and has completed its life cycle back to an in-stock status.

Before you begin
Role required: asset, itil, itil_admin

Procedure

1. Navigate to **All** > **Asset** > **Consumables**.
2. In the consumable record, click **Retire**.
   Retire appears only if the consumable asset is currently in a consumed state.
3. In the Retire Asset dialog box, select a stockroom.
   The quantity gets populated based on the quantity of the consumption of the consumable asset.
4. Update the **Quantity** field based on the quantity of consumable assets that you want to retire.
   You can choose to retire the entire quantity of consumable assets or only a part of the quantity.
5. Select a substate and click **OK**.
   You return to the consumable record. A message appears at the top of the form layout with the number of assets that you have retired.

Dispose of consumable assets

Dispose of those consumable assets that are no longer required in your stockrooms.

Before you begin
Role required: asset, itil, itil_admin
Know that the Planned for disposal column in the Consumable [alm_consumable] table indicates if the consumable asset is marked for disposal or not.

Procedure

1. Navigate to **All** > **Asset** > **Consumables**.
2. In the consumable record on the top right of the page, click **Mark for disposal**.
   Mark for disposal appears only for consumable assets that are in the in-stock state and not marked for disposal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. In the Planned for disposal dialog box, enter the total quantity or partial quantity of the consumable asset.
   If you enter a partial quantity, a new consumable record is created with the substate as pending disposal. If you enter a total quantity, the consumable's record substatus changes to "pending disposal" and you return to the same consumable record.
   After you mark the consumable asset for disposal, **Mark for disposal** no longer appears.

   Note: Only a consumable marked for disposal is included in a disposal order. After you mark a consumable for disposal, it does not get merged with another consumable record.

4. Click **Cancel from disposal** to cancel disposing a consumable asset.
   Cancel from disposal appears if the Planned for disposal column for the consumable is set to true and the **Disposal number** field is blank.
5. In the Cancel from disposal dialog box, select a stockroom.
   If a stockroom is already selected, then the **Stockroom** field is read-only.
6. Select a substate and click **OK**.
   The Planned for disposal column is set to false. If you added this consumable record to a disposal record, the planned asset record is deleted.

Stockrooms

Stockrooms are places to which assets are assigned.

When stock is low on a particular asset, stock rules can either notify an asset manager or automatically transfer inventory from one stockroom to another.

Stockrooms are separate, standalone entities in the Base Asset Management application.

Stock rules

Stock rules are defined criteria stating that when the inventory of a particular asset in a particular stockroom reaches a specified threshold, a certain number should either be transferred from another stockroom or ordered from a vendor.

For example, a specific model of computer keyboard reaches an inventory of 10 in a particular stockroom and, because a stock rule is in place, a transfer order is automatically created to transfer 50 from a different stockroom. Because there can be multiple assets of a model within a stockroom, stock rules enable you to check all assets fitting the criteria and view a total count.

There are two restocking options:

- Email notifications can be sent to the stockroom manager (specified in the **Manager** field on the stockroom record) through the **Asset Restocking** email action when the inventory of a particular asset in the stockroom reaches a specified threshold. You can customize this email notification by updating the details in the following tabs:
  - **When to send**: Set the conditions under which the email should be triggered.
  - **Who will receive**: Specify the recipients of the email.
  - **What it will contain**: Define the content and information included in the email.

  A task is automatically created for the stockroom manager or, if Procurement is active, a purchase order and a purchase order line item are created.
- A transfer order can be generated automatically to restock the item from another stockroom.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Stock Rule Runner job

The Stock Rule Runner job runs everyday to check if the inventory in the stockroom has reached the threshold set by the stock rule. The job then triggers tasks or workflows to restock the inventory. This job creates tasks for stockroom managers and also sends email notifications to them.

Important: If restocking is in progress, the system doesn't create duplicate email messages or duplicate transfer orders. It's important to act on it promptly.

By default, the *glide.sc.checkout.twostep* system property that's set to **false**, results in the automatic submission of requests when items are added to the Service Catalog cart. Also, with this setting of the system property, the Stock Rule Runner job triggers the creation of tasks, purchase orders, transfer orders, and Service Catalog requests.

If the value of the *glide.sc.checkout.twostep* system property is set to **true**, then the *CartJS* API adds items to the cart but the requests aren't submitted automatically. Instead, the request submission requires additional actions to be performed, affecting the automatic flow of the Stock Rule Runner job.

The **pending_delivery** is used to indicate whether a stock rule is awaiting fulfillment or delivery. The pending_delivery can be set to any of the following values:

- When this flag is set to **true**, the stock rule is in progress, and the system doesn't generate duplicate tasks or orders for the same item.
- When this flag is set to **false**, the system reprocesses the stock rule and triggers the creation of tasks and orders again.

Note: Make sure that the pending_delivery flag is updated to false when a stock rule has been processed, enabling the Stock Rule Runner job to run without redundancy.

Based on the Stock rule type and the plugin activated on your ServiceNow instance, the Stock Rule Runner job creates purchase orders, transfer orders, Service Catalog requests, or tasks.

Important:

If the Procurement plugin and the Hardware Asset Management application aren't activated, the Stock Rule Runner job creates a task instead of a purchase order or a Service Catalog request. This task prompts the stockroom manager to take the necessary actions to replenish the inventory.

Stock Rule Runner job behavior

Stock rule type	Orders/Requests created
Stockroom	A transfer order is created automatically when the inventory in a stockroom reaches the threshold set by the stock rule. The transfer order is created to transfer stock from another stockroom to replenish the inventory. **Note:** If a transfer order is already in progress, then additional transfer orders aren't created.
Vendor	When the Procurement plugin (com.snc.procurement) is activated, a purchase order and corresponding purchase order line items are created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Stock Rule Runner job behavior (continued)

Stock rule type	Orders/Requests created
	Important: The automatic purchase order action works only for hardware models that are published as vendor catalog items. If a model isn't published as a vendor catalog item, the stock rule still triggers when stock falls below the minimum quantity, but it can't generate a purchase order. To publish a hardware model as a vendor catalog item, see Publish an item to the hardware catalog. Purchase orders and purchase order line items are created when the inventory in a stockroom reaches the defined threshold and needs replenishment directly from the vendor. **Note:** You must have a procurement_user role to access the purchase order and purchase order line item.
Vendor or Service Catalog	When the Hardware Asset Management application is installed and the stock rule is set to Vendor or Service Catalog, then note the following points: • The Stock Rule Runner job submits a Service Catalog request instead of creating a purchase order. • The Service Catalog request is automatically submitted for stock replenishment through the Service Catalog. The items are added to the Service Catalog cart for the Stockroom manager to review and approve. • The pending_delivery flag is used to track the status of the Service Catalog requests. This flag guarantees that the Service Catalog requests are processed correctly, avoiding duplicate actions.

Related topics

Create a stock rule

Manage pre-allocated assets

Manage pre-allocated assets, which are the assets that the vendor still owns, but has agreed to store in a customer stockroom for just-in-time procurement.

Create pre-allocated assets

Create a pre-allocated asset that physically exists, but isn't yet a financial liability.

Before you begin

Role required: asset

About this task

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **All Assets** and create a record (see table for field descriptions).

   Note: Category must have the **Allow pre-allocated** option selected.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Consumable record form

Field	Description
Display name	Name of the asset.
Model category	Model category that controls whether an asset is linked to a CI.
Model	Product model of the asset.
Quantity	Number of items the asset represents.
General	
State	State of the asset.
Stockroom	Stockroom of the asset. This field is only available if the State field is set to **In stock**.
Parent	Parent asset. When a parent asset is defined, the **Assignment** and **State** fields of the child asset are automatically populated based on the **Assignment** and **State** fields of the parent asset and are read-only.
Class	Type of asset. The system automatically sets the **Class** to **Consumable**.
Expenditure type	The type of expenditure. Choose from the following: ○ **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. ○ **Opex**: Operational expenditure is an on-going expenditure. For example, toners for the photocopier.
Substate	Substate of the asset.
Location	Location of the asset.
Cost	Price that the asset was purchased for.
Cost Center	Cost center financially responsible for the asset.
Activities	
Work Notes	Work notes related to the asset.

2. Select **Submit**.

Allocate a pre-allocated asset

Assets can be allocated from pre-allocated asset records, which creates new asset records and reduces the **Quantity** in the original pre-allocated asset record.

Before you begin

Role required: asset

About this task

Allocating an asset makes it a financial liability. After all pre-allocated assets have been allocated, the pre-allocated asset record is removed from the asset list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **All Assets**.
2. Filter the **Substate** column to show only **Pre-allocated** assets.
3. Select the reference icon in the row containing the asset to allocate.
4. Select **Allocate** at the bottom of the form.

> **Note:** If the *glide.asset.create_ci_with_ire* property is set to `true`, a form appears when you click **Allocate**. On the form, fill in the **Asset tag**, **Serial number**, and **Reserved for** fields, then click **OK**.

Result

The system creates and navigates to a new asset record, which has the same model and parent information as the pre-allocated asset. The new asset has a **Quantity** of one, while the pre-allocated asset's **Quantity** is reduced by one.

Split a pre-allocated asset

You can split a pre-allocated asset to create a group that can be moved to a different stockroom.

Before you begin

Role required: asset

About this task

For example, a group of 100 pre-allocated computers is in Stockroom A. Split the group into two groups of 50 and move one group to Stockroom B. Allocate the computers from the two different stockrooms.

Procedure

1. Navigate to **All** > **Asset** > **Portfolios** > **All Assets**.
2. Filter the **Substate** column to show only **Pre-allocated** assets.
3. Select the reference icon in the row containing the asset to split.
4. Select **Split**.
5. Enter a **Quantity to Split** and select **OK**.
   The pre-allocated asset is split into two groups and the **Quantity** field on each record indicates the number in each group.

Manage transfer order

Manage the asset movement from one stockroom to the other using transfer order.

The Base Asset Management application enables asset managers to create transfer orders for moving assets between company stockrooms.

Consumable assets and non-consumable assets can be transferred as follows:

- If an asset is consumable, it can be transferred and the quantity can be greater than one. Consumable parts are tracked by the system qualitatively.
- If an asset is non-consumable, it must be transferred as a single entity with a quantity of one. Non-consumable parts correspond to assets defined in the system.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Important: In the Base Asset Management application, the Transfer Order Line workflow manages the processing of transfer order lines. If your ServiceNow instance has the following plugins activated, the transfer order lines are processed using a workflow, depending on the plugin installed.

- If the Service Management Core plugin is activated, the Transfer Order Line SM core workflow manages the processing of the transfer order lines.
- If the Field Service Management plugin (com.snc.work_management) is activated, the Transfer Order Line SMCore workflow manages the processing of the transfer order lines.

For more information, see Move an asset through the transfer process.

Transfer order lines

Transfer Order Lines is a new module under Inventory with Template Tasks and Template Subtasks as the sub modules. Transfer order lines allow the transfer of multiple assets on one transfer order. Actions such as shipment preparation can take place at the transfer order line level. Pre-allocated assets can be included in a transfer order line, but can only be transferred in their full quantity. A business rule prevents the same asset from being transferred on two different transfer orders at the same time.

Note: The Transfer Order and the Transfer Order Line workflows have moved from the Procurement plugin to the Asset Management plugin. The Transfer Order Line workflow runs only if no other workflows are matched or running on a specific record.

Transfer order line tasks

When you create a transfer order line, based on the model category specified in the asset, a transfer order line task is automatically created. Transfer order line tasks are created to move transfer order lines from one stage to the other. Transfer order line tasks also help you to track service levels and the time frame needed to complete a transfer order.

Default template tasks are available with the Base Asset Management application. The template tasks are based on model categories. Default template tasks cannot be deleted or modified. If required, you can also create your own customized template tasks. For more information, see Create a customized template task. When you create a transfer order line and select an asset, that asset corresponds to a model category. If a customized template task exists for that model category then that template task is added to the transfer order line as a transfer order line task. If no customized template task match is found for the asset you selected, then the default template task is added as a transfer order line task.

Closing a transfer order line task completes the task and creates the next task in the process. For example, once you close the Ready for fulfillment task, the state for this task appears as **Closed Complete** and a new task is opened for the next stage, Ready for Shipment. This process continues till you close all the tasks required for completing the transfer order line. As you close a task and as a task moves from one stage to the next, the asset gets automatically updated too. For example, when the transfer order line moves from Ready to Fulfillment to Prepare for Shipment, the asset's status also moves from available to reserved.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

If you skip a transfer order line task and select **Closed Skipped**, the asset is not updated automatically. Once the asset is received or delivered, you can make the update manually.

If you are upgrading from any previous release to the New York release, and you have an open transfer order line that is still being processed, all the transfer order line tasks associated with that transfer order line are simultaneously created and displayed in the transfer order line form layout. Based on the stage of the transfer order line, the tasks that still need to be processed will be open; all the other tasks that have already been completed will be closed. Based on the order, if you close a later transfer order line task, all the previous tasks, which are currently open, automatically will be **Closed Skipped**.

Transfer order line subtasks

To further add granularity and efficiency to the process, you can also create subtasks for each transfer order line task. Each transfer order line task can have multiple subtasks. For example, before preparing for shipment, for a computer, you may want to create subtasks for imaging the computer or adding additional software. If subtasks have been defined for a particular transfer order line task, then the subtasks are automatically added to the transfer order line task. Once all the subtasks are closed, the transfer order line task is automatically closed. For more information, see Create a template subtask.

Related topics

Transfer order flow

Transfer order flow

Use the Transfer Order flow to track asset movement from one stockroom to the other and the Transfer Order Line flow to handle the processing of transfer order lines. You can edit the existing flow or create a flow in the graphical Workflow Studio to meet your organization's asset transfer process.

Prerequisites

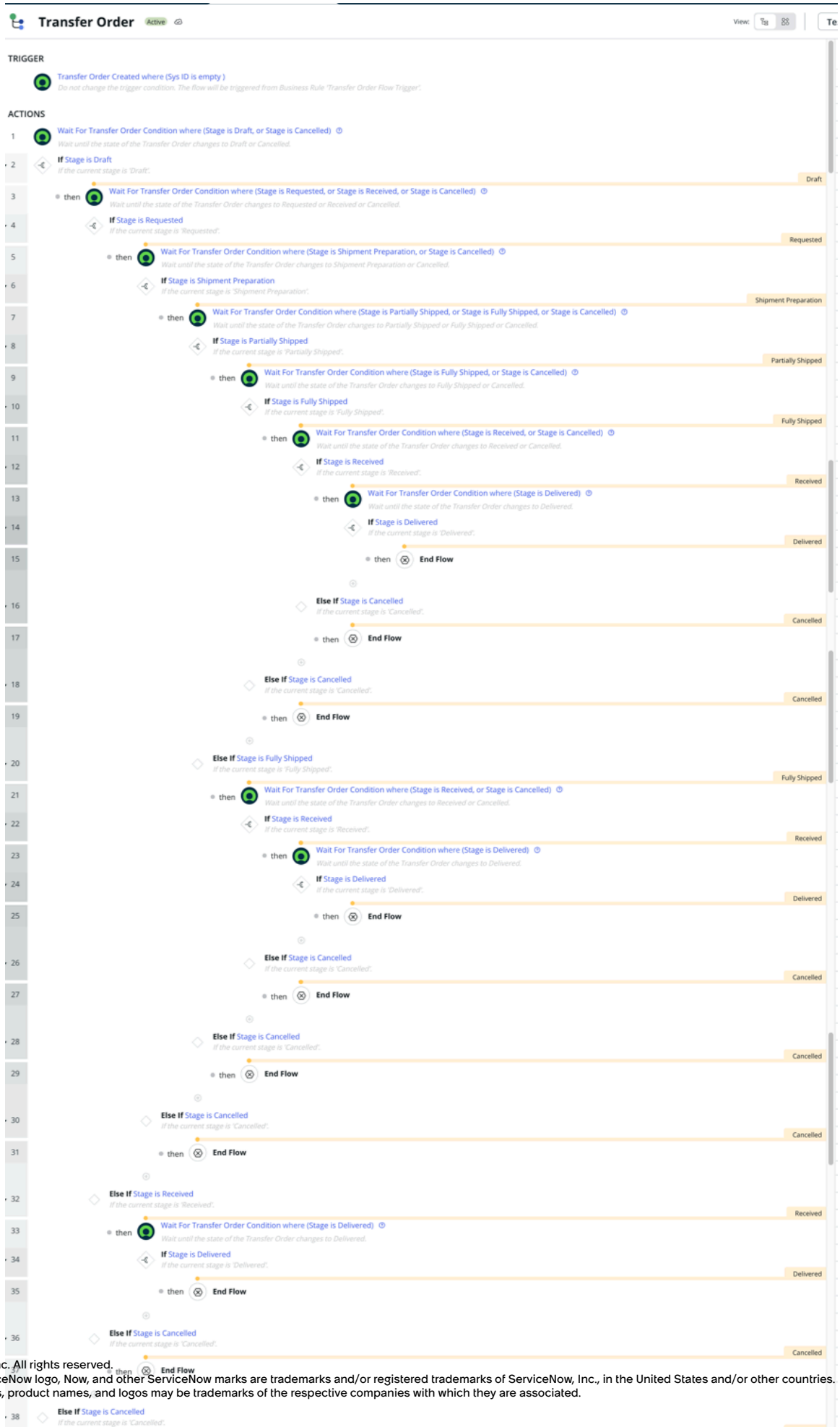
The Asset Management (com.snc.asset_management) plugin is installed.

Transfer Order

In the asset life cycle automation process, the In stock assets are transferred from one stockroom to the other through the Transfer Order flow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Transfer Order

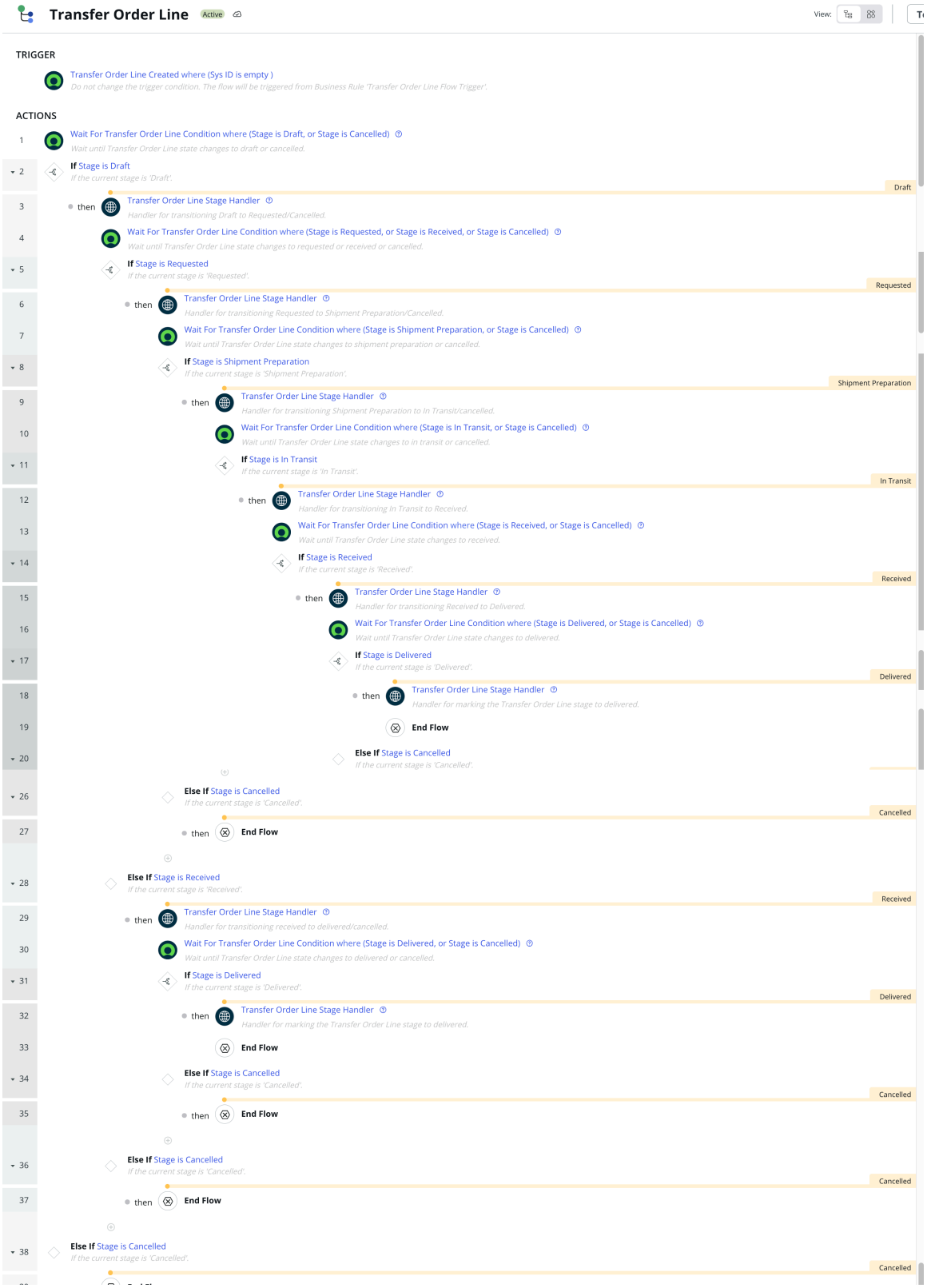


© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Transfer Order Line

In the asset life cycle automation process, when multiple assets are transferred under one transfer order, the Transfer Order Line flow handles the processing of transfer order lines.

Transfer Order Line



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Transfer assets using transfer orders

Transfer order tasks

Transfer assets from one location to the other by moving the assets through the transfer order process. Transfer order lines specify the exact items that comprise a transfer order.

Create a transfer order

Create a transfer order to move one or more assets from a source stockroom to a destination stockroom.

Before you begin

Role required: inventory_user

The inventory_user, asset, or procurement_user role can only access the Transfer Order [alm_transfer_order] reports. You must activate the Procurement (com.snc.procurement) plugin for the inventory_user, asset, and procurement_user roles.

Procedure

1. Navigate to **All** > **Inventory** > **Transfer Orders** > **Create Transfer Order**.
2. In the **From Stockroom** list, select a stockroom from which you want to ship the items.
3. In the **To Stockroom** list, select a stockroom where you want to ship the items.

   Note: If you select the same stockroom in both the **From Stockroom** and **To Stockroom** fields, the transfer order automatically moves from **Draft** to **Received** when a transfer order line is added.

4. Select a date and time for the delivery from the **Delivery by date** date picker.
5. Select **Submit**.

Result

Transfer order record is created.

What to do next

Create transfer order lines to specify the items that the transfer order comprises of.

Related topics

Create transfer order line

Create transfer order line

Add a transfer order a line to a transfer order for each asset or consumable model you want to move.

Before you begin

Role required: inventory_user

The inventory_user, asset, or procurement_user role can only access the Transfer Order [alm_transfer_order] reports. You must activate the Procurement (com.snc.procurement) plugin for the inventory_user, asset, and procurement_user roles.

About this task

A transfer order can contain one or more transfer order lines. Under a single transfer order, all transfer order lines have the same **From location** and **To location**. Each line contains an asset to transfer and the quantity to transfer. The item to transfer is identified by asset name and model

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

name. A transfer order line can involve one quantity of a non-consumable asset or multiple quantities of a consumable asset. A bundled model can be transferred.

Procedure

1. Navigate to **All** > **Inventory** > **Transfer Orders** and open the transfer order.
2. Next to **Transfer Order Lines**, select **New**.
3. On the Create transfer order line form, fill in the fields.
   For a description of the field values, see Transfer order line fields.
4. If the model is a consumable, specify a quantity in **Quantity Requested**.
5. Select **Submit**.
   After creating transfer order lines, the transfer order and all the transfer order lines are in the draft stage. While a transfer order or a transfer order line is in the draft stage, it can be deleted.

> **Note:** When an asset is part of a transfer order set to **Draft**, the asset record updates to show the asset as reserved. You can't request or transfer the asset while it's reserved.

Result
A transfer order line is created along with a transfer order line task.

What to do next
Close the transfer order line task to complete the task.

Related topics

Create a transfer order

Close transfer order line task

Close transfer order line task

Progress a transfer order line through diffident stages by closing the transfer order line task.

Before you begin
Role required: inventory_user

Procedure

1. Navigate to **All** > **Inventory** > **Transfer Orders** and open the transfer order.
2. In the Transfer Order Lines related list, open the transfer order line.
3. In the Transfer Order Line Tasks related list, open the current open task.
   The task name reflects the current stage, for example, **Ready for fulfillment**.
4. Review the task details and select **Close Task**.

Result

- The current task closes with a status of Closed Complete.
- The next task in the sequence opens automatically.
- he asset status on the asset record updates to reflect the new stage.

What to do next
Keep closing each task until you reach the last stage **Received**. After you close the task for the **Received** stage, the transfer order line is completed and closed. All transfer order lines and the transfer order are marked **Delivered**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Create a transfer order

Create transfer order line

Summary of transfer order line tasks

Perform bulk updates for transfer order lines

Update tasks for multiple transfer order lines at one go to streamline the transfer order process.

Before you begin

Transfer order lines enable the transfer of multiple assets on a transfer order. When you create a transfer order line, a transfer order line task is automatically created. Transfer order line tasks are created to move transfer order lines from one stage to the other. Each transfer order line can have multiple tasks such as **Requested**, **Shipment Preparation**, **In Transit**. For information on the stages of a transfer order line task, see Summary of transfer order line tasks.

Role required: asset_system_admin or inventory_user

Procedure

1. Navigate to **All** > **Inventory** > **Transfer Order**.
2. Select **Bulk Update** next to the Transfer Order Lines related list.
   The system property *sn_itam_tol_bulk_update_max_count* determines the maximum count of transfer order lines that would be processed during a single bulk update operation.
   The Bulk Update - Transfer Order Line dialog box appears.
3. In the **Select a stage** field, select the stage that you want to move this task to.
   For example, if all the transfer order lines are currently in the **Draft** stage and you want to move them to the next stage, which is **Requested**, select **Requested** in the **Select a stage** field.
   All transfer order lines, along with the asset display names that are eligible to move to the selected stage appear in the **Available** box.

   Note: If there are no transfer order lines eligible to move to the selected stage, the **Available** box doesn't display any transfer order lines.

4. In the **Assigned to** field, select the person you want to assign this task to.
   The **Assigned to** field defaults to the logged-in user.
5. Select the transfer order lines in the **Available** box and move them to the **Selected** box.
   When you select the transfer order lines, you can view the model and asset display names for hardware and consumable assets. For consumable assets, you can view additional details such as quantity requested and quantity received.
6. Select **Update**.
   All the selected transfer order line tasks and associated subtasks for the selected stage are closed and the next task in the process is created. For example, all the transfer order line tasks in the **Requested** stage are closed and the next task in the process **Shipment Preparation**, is created.
7. Return to the Bulk Update - Transfer Order Line dialog box to continue this process until you close all the tasks required for completing the transfer order line.

Delete a transfer order

You can delete a transfer order only if the transfer order is still in the draft stage.

Before you begin

Role required: inventory_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The inventory_user, asset, or procurement_user role can only access the Transfer Order [alm_transfer_order] reports. You must install the Procurement (com.snc.procurement) plugin for the inventory_user, asset, and procurement_user roles.

Procedure

1. Navigate to **All** > **Inventory Management** > **Transfer Orders** > **Transfer Orders**
2. Select the check box beside a transfer order.
3. From the Actions on the selected rows menu at the bottom of the list, select **Delete**.

Related topics

Delete a transfer order line

Return items received in a transfer order

Delete a transfer order line

You can delete a transfer order line only if it's still in the draft stage.

Before you begin
Role required: asset_system_admin or inventory_user

The inventory_user, asset, or procurement_user role can only access the Transfer Order [alm_transfer_order] reports. You must install the Procurement (com.snc.procurement) plugin for the inventory_user, asset, and procurement_user roles.

Procedure

1. Open a transfer order.
2. Select the check box beside a transfer order line.
3. From the Actions on the selected rows menu at the bottom of the list, select **Delete**.

   Alternatively, you can cancel a transfer order or a transfer order line while it is in **Requested** or **Shipment Preparation** stage. Once all the lines are canceled, the transfer order is automatically canceled.

Related topics

Delete a transfer order

Return items received in a transfer order

Return items received in a transfer order

Return items from a received transfer order when all or some of the delivered assets are defective or incorrect.

Before you begin
Role required: inventory_user

The inventory_user, asset, or procurement_user role can only access the Transfer Order [alm_transfer_order] reports. You must activate the Procurement (com.snc.procurement) plugin for the inventory_user, asset, and procurement_user roles.

About this task
Items in a transfer order must be received before they can be returned.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Inventory Management** > **Transfer Orders**.
2. Select a transfer order that is in the **Received** stage.
3. Click the transfer order line **Number** of the item to return.
4. Click **Return**.
5. Enter a quantity to return.
6. Enter a reason for the return.
7. Select the **Defective** check box to return items that are broken.

   Defective items are returned to the stockroom from which they were delivered, but aren't added to available stock. Instead, they're tracked in the separate category named "Defective" so they can't be requested or transferred again.
8. Click **OK**.
9. Click **Update**.

   A new transfer order line is automatically created.

   A new corresponding parent transfer order is also automatically created with the new transfer order line on it.
10. If you're returning a consumable, navigate to the transfer order line record, and click the model name to open the model record.

    The model record shows which stockrooms contain the model. The one defective model is listed.

    Note: The defective model is still at the stockroom to which it was delivered. The defective model must be transferred back to the stockroom where it originated.
11. Move the new transfer order through the regular transfer order process.
    Items are automatically returned to the stockroom from which they were delivered. A transfer order line item that has been returned can't be delivered later.

    If you return another defective model from the same, original order, the two defective returns are merged into one line item.

Customize transfer order line tasks

Understand how transfer order line tasks are structured and when to create customized template tasks or subtasks for your organization's asset transfer process.

When you add a line to a transfer order, a transfer order line task is automatically created for that line. This task represents the first stage in the transfer process for that asset. When you close each task, the next task in the sequence is created, moving the asset through the transfer stages until the line is complete.

Template tasks help you progress through the various stages of the transfer order line. A template task defines the sequence of stages the line must pass through. The template tasks are based on model categories. For example, when you create a customized template task for the Application model category, whenever a transfer order line is created for the Application model category, the template tasks associated with the Application model category are used as transfer order line tasks.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a customized template task

Create customized template tasks to configure your specific task workflow for transfer order lines. Default template tasks are available with the Base Asset Management application. You can't modify or delete a default template task.

Before you begin

Role required: asset_system_admin or inventory_user

About this task

Template tasks help you progress through the various stages of the transfer order line. Custom template tasks are stored in the Custom Template Task [alm_custom_template_task] table. When you create customized template tasks, make a copy of the Transfer Order Line workflow and update the workflow accordingly. For example, if you need only four tasks out of five, you can delete the additional task from the workflow.

Note: Two template tasks can't be created when they're based on the same model category, the same order number and the same stage. The model category, the order, and the stage have to be unique for each template task. For example, you can't create two template tasks for Prepare for Shipment, based on the Application model category, order number 200, and the stage as Requested. If you try to create an identical template task as mentioned in the example, an error message is displayed.

Procedure

1. Navigate to **All** > **Inventory** > **Transfer Order Lines** > **Template Tasks**.
   All the default template tasks that are available with the Asset Management application are listed.
2. Select **New**.
   You can also customize a template task by copying a default template task. Click **Copy Default Template** and select a model category.
3. Fill out the form fields (as shown in the table).

Field	Description
Task name	Name of the template task
Model category	Model category this template task is based on.
Order	Order in which the template task is added to the transfer order line.
Short description	Brief description about this template task.
Next stage	Stage that this template task gets executed.

4. Click **Submit**.

Create a template subtask

Create template subtasks to add granularity to the transfer order line tasks. For example, before preparing for shipment, for a computer, you may want to create sub tasks for imaging the computer or adding additional software.

Before you begin

Role required: asset_system_admin or inventory_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

The template subtasks that you create are stored in the Template Subtask [alm_template_subtask] table. When a transfer order line task is created and if subtasks are defined for that transfer order line task, then the subtasks are automatically added to the transfer order line task.

Procedure

1. Navigate to **All** > **Inventory** > **Transfer Order Lines** > **Template Subtasks**.
2. Click **New** and fill out the form fields (as shown in the table).

Field	Description
Short Description	A brief description of the subtask.
Subtask name	A name for the subtask.
Task	The task that this subtask is associated to.

3. Click **Submit**.

Transfer assets using transfer orders

Transfer assets from one location to the other by moving the assets through the transfer order process. Transfer order lines specify the exact items that comprise a transfer order.

Before you begin

Role required: inventory_user

The inventory_user, asset, or procurement_user role can only access the Transfer Order [alm_transfer_order] reports. You must activate the Procurement (com.snc.procurement) plugin for the inventory_user, asset, and procurement_user roles.

About this task

You create a transfer order and move it from its initial **Draft** status to the final **Received** status. A transfer order can contain one or more transfer order lines. Under a single transfer order, all transfer order lines have the same From location and To location. Each line contains an asset to transfer and the quantity to transfer. The item to transfer is identified by asset name and model name. A transfer order line can involve one quantity of a non-consumable asset or multiple quantities of a consumable asset. A bundled model can be transferred.

Procedure

1. Complete the following steps to create a transfer order.

   a. Navigate to **All** > **Inventory** > **Transfer Orders** > **Create Transfer Order**.

   b. In the **From Stockroom** list, select a stockroom from which you want to ship the items.

   c. In the **To Stockroom** list, select a stockroom where you want to ship the items.

   Note: If you select the same stockroom in both the From Stockroom and To Stockroom fields, the transfer order automatically moves from **Draft** to **Received** when a transfer order line is added.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

d. Select a date and time for the delivery from the **Delivery by date** date picker.

e. Select **Submit**.

Transfer order record is created.

2. Complete the following steps to create a transfer order line under the transfer order.

a. Navigate to **All** > **Inventory** > **Transfer Orders** and open the transfer order.

b. Next to **Transfer Order Lines**, select **New**.

c. On the Create transfer order line form, fill in the fields.
For a description of the field values, see Transfer order line fields.

d. If the model is a consumable, specify a quantity in **Quantity Requested**.

e. Select **Submit**.
After creating transfer order lines, the transfer order and all the transfer order lines are in the draft stage. While a transfer order or a transfer order line is in the draft stage, it can be deleted.

> **Note:** When an asset is part of a transfer order set to **Draft**, the asset record updates to show the asset as reserved. You can't request or transfer the asset while it's reserved.

A transfer order line is created along with a transfer order line task.

3. Open the transfer order line task and select **Close Task**.
The transfer order line task is completed and a new transfer order line task is opened.

What to do next

Keep closing each task until you reach the last stage (**Received**). After you close the task for the Received stage, the transfer order line is completed and closed. All transfer order lines and the transfer order are marked **Delivered**.

Related topics

Transfer order flow

Summary of transfer order line tasks

Transfer order line fields

Transfer order line asset tracking

As transfer order line actions are triggered, the stock information and states of any affected assets are updated. Consumables and non-consumables are tracked differently.

When an asset is included in a transfer order line, the following takes place:

- A substate field on the asset form changes to reflect the transfer order line states
- The Active TO option on the asset form is automatically selected to show that the asset is part of a transfer order and cannot be added to multiple transfer orders
- The asset is removed from the pool of available assets and changed to a state of *In Stock Pending Transfer*

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

- Delete a transfer order
- Delete a transfer order line
- Return items received in a transfer order

Transfer order line asset tracking of non-consumables

When transfer order line stages change for non-consumables, it affects asset substates.

Transfer order line stage	Affect on asset substate
Draft	Asset moves to **In Stock** > **Pending Transfer** (from the current stockroom). If the asset is a consumable, the quantity can be edited.
Requested	Asset stays in **In Stock** > **Pending Transfer**.
Shipment Preparation	Asset stays in **In Stock** > **Pending transfer**.
In Transit	Asset moves to **In Transit** > **Reserved**.
Received	Asset moves to **In Stock** > **Available** (in the destination stockroom).
Delivered	Asset moves to **In Stock** > **Reserved**.

Related topics

- Delete a transfer order
- Delete a transfer order line
- Return items received in a transfer order

Transfer order line asset tracking consumables

When a consumable is added to a transfer order line, the stock for the consumable is split into two records and the transfer order links to the newly created stock line.

For example:

1. Stockroom A has ten keyboards in stock.
2. A transfer order line named TOL1 transfers three keyboards from stockroom A to stockroom B.
3. The stock of ten keyboards in A is split into two records: seven shown as **In stock** > **Available** and three shown as **In Stock** > **Pending Transfer**.
4. Another transfer order is created with a transfer order line named TOL2 that transfers two keyboards from stockroom A to stockroom B.
5. The seven remaining keyboards are split into another two lines: five **In stock** > **Available** and two **In stock** > **Pending Transfer**.

   Note: The three **In Stock** > **Pending Transfer** and the two **In Stock** > **Pending Transfer** are not merged together because they are not part of the same transfer order line and not necessarily from the same person.

6. As TOL2 for two keyboards moves from *Draft* to *Requested* to *Shipment Preparation*, TOL1 for the three keyboards remains **In Stock** > **Pending Transfer**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. When TOL1 for the three keyboards moves to the *In Transit* stage, the three keyboards are changed to the **In Transit** > **Reserved** stage. The same happens for TOL2 with two keyboards.
8. When TOL1 is *Received*, the three keyboards move to **In stock** > **Available** in stockroom B.
9. When TOL2 is received in stockroom B, the two keyboards move to **In stock** > **Available** and are merged with the three keyboards that are also **In Stock** > **Available** in B.
10. At the end, stockroom B shows five keyboards are **In Stock** > **Available**.

Related topics

Delete a transfer order

Delete a transfer order line

Return items received in a transfer order

Use Organization Management

The Organization Management application provides an easy way to perform such asset management tasks as updating users and adding vendors.

It includes managing your vendors and manufacturers, as well as managing locations.

Create a new vendor or manufacturer

You can create a new vendor, which is a company that sells assets or services that your organization purchases. You can also create a new manufacturer, which is a company that builds assets that your organization purchases.

Before you begin

Role required: user_admin and asset

Procedure

1. Navigate to one of the following:
   - **Organization** > **Vendors**
   - **Organization** > **Manufacturers**
   - **Organization** > **Companies**
2. Click **New** and create a new record.
3. Complete the form and select either **Manufacturer** or **Vendor**.

   Note: A company can be considered both a vendor and a manufacturer.

4. Click **Submit**.

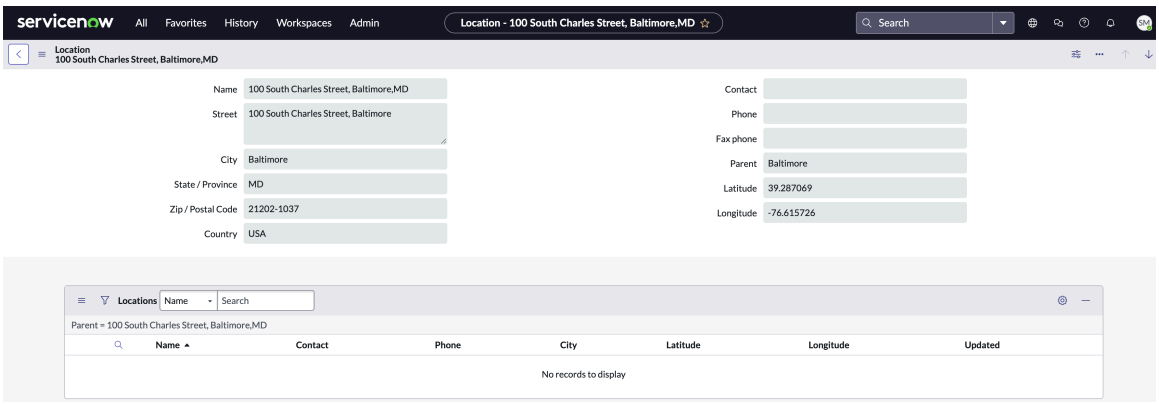
Locations module

The Locations module is the Asset view of the Location table [cmn_location].

In addition to the physical specifics for the location, the Asset view includes the **Stock room** designation and a list of configuration items (CI) in stock at that location.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset location



Asset Management references

Reference topics provide additional information about the lists and forms that you use to configure and administer Asset Management.

Domain separation and Base Asset Management

Domain separation is supported in Base Asset Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Quick start test for Base Asset Management

Validate that Base Asset Management still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Asset Management

Asset Management quick start tests requires the Asset Management plugin (com.snc.asset_management).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Asset Management test

Name	Description	Release version
Asset Sourcing - Consume local asset stock	Validates the consume local asset stock flow.	Yokohama

Related topics

Quick start tests

Installed with Base Asset Management

Several tables, user roles, UI policies, script includes, client scripts, and business rules are installed with Asset Management.

Demo data is available with asset management. The demo data provides information such as users, assets, and individual stockrooms.

Tables

Base Asset Management includes the following tables.

Base Asset Management tables

Table	Description
Asset [alm_asset]	Stores general, financial, and contractual information about assets.
Asset Entitlement [alm_entitlement_asset]	Enables ServiceNow to categorize the Asset Entitlement table and enforce how entitlements behave.
Consumable [alm_consumable]	Stores data about consumable assets (previously known as parts).
Default Stockroom [alm_user_stockroom]	Stores the relationship between a user and their default stockroom.
Fixed Assets [alm_fixed_assets]	Stores fixed assets, which are containers that can hold multiple assets.
Fixed asset to asset [m2m_fixed_asset_to_asset]	Stores associations between fixed assets and assets.
Hardware [alm_hardware]	Stores general, financial, and contractual information about hardware assets.
License Entitlement [alm_entitlement]	Stores entitlements that permit users or machines to use a software license.
Software License [alm_license]	Stores general, financial, and contractual information about software license assets.
Stock Rule [alm_stock_rule]	Transfers stock or sends an email message to the asset manager when a specified asset drops below a set threshold.
Stockroom [alm_stockroom]	Stores information about stockrooms.
Stockroom Model [alm_m2m_stockroom_model]	Tracks all models that have ever been stocked in a stockroom. This table is automatically populated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Base Asset Management tables (continued)

Table	Description
Stockroom Type [alm_stockroom_type]	Stores general information about stockroom types.
Transfer Order [alm_transfer_order]	Contains data about transfer orders, including the state and stockrooms. **Note:** The inventory_user, asset, or procurement_user role can only access the reports. You must activate the Procurement (com.snc.procurement) plugin for the inventory_user, asset, and procurement_user roles.
Transfer Order Line [alm_transfer_order_line]	Contains data about individual assets being shipped with a transfer order.
User Entitlement [alm_entitlement_user]	Enables ServiceNow to categorize the User Entitlement table and enforce how entitlements behave.

User roles

Base Asset Management includes the following user roles.

Base Asset Management user roles

Role	Contains roles	Tasks
asset (Asset Manager)	• category manager • contract manager • financial mgmt user • inventory user • procurement user	• Manage hardware and consumable assets ([alm_hardware] and [alm_consumable]). • Asset manager can't edit asset records that are created and updated automatically, but can read and delete the asset records when needed. • Create requests. • Create and delete stock information. • Access to requests, purchase orders, and base system catalog tasks.
inventory_admin	inventory user	• Create and delete stock information. • Edit stock rules, stockrooms, and stockroom types.
inventory_user	none	• Access stock information. • Create and manage transfer orders.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Base Asset Management user roles (continued)

Role	Contains roles	Tasks
sam	• contract manager • model manager • financial mgmt user	• Create, edit, change, and manage software licenses. • Edit the Software model field on a Discovery models and software installations. • Approve a model. Has full control of the Software Asset Management application. • Controls the Software Asset Management IBM PVU Process Pack, if activated.

Granular roles

Granular admin roles for Base Asset Management

Asset Management functionality	Granular admin role	Description
Asset job log and asset job log detail	asset_system_admin	Provides read access to Asset job log [asset_job_log] and [asset_job_log_detail] tables and their reports.
Asset task	asset_task_admin	Allows create and delete operations on Asset task [asset_t
Content audit	asset_system_admin	Provides access to read and view reports on Asset content [asset_content_audit] table.
Transfer order	asset_system_admin	• Provides access to write, delete, and create records on t ◦ Custom Template Task [alm_custom_template_task] ◦ Template Subtask [alm_template_subtask] • Provides access to modules that include **Transfer Order Tasks**, and **Template Subtasks**. • Provides access to manage transfer order operations inc default templates, closing tasks and subtasks.
Procurement - Consume Asset Task	procurement_system_admin	Provides access to create and delete records on Consume [consume_asset_task] table, and perform close task UI act
Procurement-related system property	procurement_system_admin	Provides access to the *glide.model.catalog_item* property.
Contract	contract_system_admin	• Provides access to **Condition check definitions** menu. N **Contract** > **Administration** > **Condition check definition** • Provides read access to Condition check [clm_condition • Provides list edit access for Asset Covered [clm_m2m_c • Provides access to the following system properties: ◦ *com.sn_itam.enable_flow_designer.cont* ◦ *contract_compliance_check_job.batchSi*

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Granular admin roles for Base Asset Management (continued)

Asset Management functionality	Granular admin role	Description
		○ *contract_compliance_check_job.enable_* ○ *contract_compliance_check_job.batchir*
Asset Management system properties	asset_system_admin	Access to the following system properties: • *glide.ui.cmdb_model_category_activity.* • *glide.create_alm_asset.async* • *glide.ui.alm_license_activity.fields* • *glide.ui.sn_itam_common_rfid_asset_act* • *sn_itam_trigger_depreciation_job_after* • *glide.cmdb_model.display_name.shorten* • *glide.ui.alm_asset_activity.fields* • *glide.ui.alm_pallet_activity.fields* • *sn_itam_exclude_ibi_asset_reporting* • *glide.ui.alm_consumable_activity.field* • *sn_itam_workspace.asset_overview_enabl* • *sn_itam_enable_cache_for_asset_ci_mapp* • *sn_itam_workspace.asset_estate_enable_* • *glide.ui.alm_hardware_activity.fields* • *glide.asset.create_ci_with_ire* • *sn_itam_enable_caching_for_depreciatio* • *sn_itam_tol_bulk_update_max_count* • *sn_itam_stockrulejob_batch_size* • *sn_itam_workspace.customExtendedAssetC* • *sn_itam_depreciation_job_last_run* • *glide.asset.procurement.sourcing.local* • *sn_itam_enable_pid_recalculation_for_c*
ITAM Licensing	asset_licensing_admin	• Provides access to the following menu options under **ITA** ○ **ITAM Subscription Summary** ○ **ITAM License Report** • Allows read and report view access for records in the foll ○ ITAM Asset Usage [itam_asset_usage] ○ ITAM CI Usage [itam_ci_usage] ○ ITAM Licensing Resource Counts [itam_licensing_reso

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Granular admin roles for Base Asset Management (continued)

Asset Management functionality	Granular admin role	Description
Recommendations	asset_recommendation_admin	Provides create, read, update, delete, and report view acce tables: • Important Action Card [sn_itam_recomm_action_card] • Important Actions Dashboard [sn_itam_recomm_dashbo • Important Actions Dashboard Result [sn_itam_recomm_ • Important Actions Setup [sn_itam_recomm_setup] • Important Actions Setup Result [sn_itam_recomm_setup • Important Actions Workspace [sn_itam_recomm_worksp
Model Management	asset_system_admin	Provides access to create assets from model categories.

UI policies

Base Asset Management includes the following UI policies.

Base Asset Management UI policies

Name	Table	Description
Hide asset tag and serial num	[alm_asset]	Hides the asset tag when the asset is pre-allocated and the quantity is greater than 1.
Hide/show parent stockroom on Stockroom Replenish	[alm_stock_rule]	Shows the Parent stockroom field only when the Restocking option field is set to Stockroom.
Make allocated to and assigned to required.	License Entitlement [alm_entitlement]	Makes the Allocated to and Assigned to fields required.
Make substatus read-only when not required	[alm_asset]	Sets the Substatus to read-only if the State is On order, In use, Consumed, or In maintenance.
Model bundle field hidden but present for UI Policy conditions purposes	[alm_asset]	Hides the Model Bundle field. Exists on page only for use by UI policies and client scripts.
Pre-allocated constraints	[alm_asset]	Hides unneeded fields and related lists when the asset is pre-allocated.
Quantity readonly until model and category qualify the asset and are not bundle	[alm_asset]	Sets the Quantity field to read-only for assets that aren't consumable, software, or pre-allocated. Quantity is also read-only if the model or model category fields are empty.
Show 'Assigned to'	[alm_asset]	Shows the Assigned to field if the State field is notOn order, In stock, or In transit.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Base Asset Management UI policies (continued)

Name	Table	Description
Show 'Reserved for'	[alm_asset]	Shows the Reserved for field if the State field is On order, In stock, or In transit.
Show 'Stockroom'	[alm_asset]	Shows the Stockroom field if either of the following conditions is true: • The State field is In stock and Substate isn't Pre-allocated. • The Substate is Pre-allocated and Parent is empty.

Script includes

Base Asset Management includes the following script includes.

Base Asset Management script includes

Name	Description
AssetandCI	Code for creating and managing the relationship between asset and CI records.
AssetAndCISynchronizer	Synchronization code between asset and CI records.
AssetUtils	Utility functions for asset management. Also checks if a license can be merged and then merges licenses if requirements are met.
AssetUtilsAJAX	AJAX-based utility functions for asset management. Call the AssetUtils script include from a client-side UI action.
Consumables	Code to change (for example, consume, split, and merge) consumables.
FixedAssetUtils	Methods for rolling up fixed asset costs.
PortalFilters	Filters used in the My Assets portal.
PreAllocatedAssets	Code to change pre-allocated assets.
StockRuleFilters	Reference qualifier code for filtering options on reference fields on stock rules.
StockRuleTransfer	Transfer order creation code for when stock rules are triggered.
TransferOrderDateTimeAjax	Date comparison utility for transfer orders.
TransferOrderFilters	Reference qualifier code for reference field filtering options on transfer orders.
TransferOrderFinder	Finds an appropriate transfer order to put a transfer order line into.
TransferOrderHelper	Function that checks if a transfer order has multiple transfer order lines.
TransferOrderLineFilters	Reference qualifier code for reference field filtering options on transfer order lines.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Base Asset Management script includes (continued)

Name	Description
TransferOrderReceiver	Code for receiving a transfer order line.
TransferOrderReturn	Code for returning a transfer order line.
TransferOrderStageHandler	Code for changing transfer order stages and transfer order line stages.
TransferOrderStageHelper	Helper method to get numeric stages for transfer orders and transfer order lines.

Client scripts

Base Asset Management includes the following client scripts.

Base Asset Management client scripts

Name	Table	Description
Correct substatus	[alm_asset]	Updates the Substatus field when the Status field is modified.
Ensure no negative quantity	[alm_asset]	Clears the Quantity field when set to less than 1.
Error on pre-allocated substatus	[alm_consumable]	Prevents Substatus field from being set to be Pre-allocated for consumable assets. Also displays an error message.
Error on pre-allocated substatus	[alm_license]	Prevents Substatus field from being set to be Pre-allocated for license assets. Also displays an error message.
Null out allocated_to	[alm_entitlement]	Does the following when the Assigned to field is set: • Clears the Allocated to field and makes it not required. • Makes the Assigned to field required.
Null out assigned_to	[alm_entitlement]	Does the following when the Allocated to field is set: • Clears the Assigned to field and makes it not required. • Makes the Allocated to field required.
Salvage must be less than cost	[alm_asset]	Displays a warning if a salvage value greater than the cost of an asset is entered.
Set Asset's Cost and	[alm_asset]	Populates the Cost field when the Model field is set.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Base Asset Management client scripts (continued)

Name	Table	Description
Expenditure Type		
Set Loc/ CC/Dep/Com from assigned to	[alm_asset]	Populates the Location, Cost center, Department, and Company fields when the Assigned to field is set.
Set Location from stockroom	[alm_asset]	Populates the Location field when the Stockroom field is set.
Update From Location from Stockroom	[alm_transfer_order]	Populates the From location field when the From stockroom field is set.
Update Model and Quantity based on Asset	[alm_transfer_order_line]	Populates the Model field when the Asset field is set. If the asset is a pre-allocated asset, this client script also populates the Quantity field.
Update To Location from Stockroom	[alm_transfer_order]	Populates the To location field when the To stockroom field is set.
Update UI on load and model change	[alm_transfer_order_line]	Runs checks, and updates the user interface, when the transfer order line form is loaded and when a model is selected.
Validate Delivery by Date	[alm_transfer_order]	Validates that the delivery date is in the future.
Verify Stock Available	[alm_transfer_order_line]	Verifies that stock exists to fulfill the quantity requested.
Verify Stock Available (Stockroom)	[alm_transfer_order_line]	Verifies that stock exists to fulfill the quantity requested when the From stockroom value changes.

Business rules

Base Asset Management includes the following business rules.

Base Asset Management business rules

Name	Table	Description
Allocated more licenses than rights	Software License [alm_license]	Prevents creation or update of a license if the number of licenses allocated is larger than the total rights.
Asset Retirement	Asset [alm_asset]	Clears the Assigned to, Stockroom, and Reserved for fields and sets the retirement date to the current time when the asset is retired.
Automatically Change TOL State	Transfer Order Line [alm_transfer_order_line]	If a transfer order has the same From stockroom and To stockroom and it's a personal stockroom, this business rule:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Base Asset Management business rules (continued)

Name	Table	Description
		• Sets the transfer order line Stage to Delivered. • Sets the asset Substate to Reserved. If a transfer order has the same From stockroom and To stockroom and it isn't a personal stockroom, this business rule: • Sets the transfer order Stage to Received. • Sets the asset Substate to Pending transfer.
Build bundle components on Insert	Asset [alm_asset]	Creates assets for the components related to a bundle if the model of the created asset is a bundle.
Clear Assigned To on update	Asset [alm_asset]	Clears the Assigned to field if the State field changes to On order, In stock, or In transit.
Clear fields irrelevant for preallocated	Asset [alm_asset]	Clears the value of fields that are irrelevant for pre-allocated assets.
Create Asset on insert	Configuration Items [cmdb_ci]	Creates a corresponding asset when a new configuration item with no asset is created.
Create asset on model change	Configuration Items [cmdb_ci]	Creates a new associated asset when the Model ID field changes.
Create CI on insert	Asset [alm_asset]	Creates a corresponding configuration item when a new asset with no configuration item is created.
Create Stockroom Model Relation	Asset [alm_asset]	Creates a record (if none exists) in the Stockroom Model table indicating the stockroom that holds the model when an asset is created or updated.
Delete all Transfer Order Lines	Transfer Order [alm_transfer_order]	Deletes all related transfer order lines when a transfer order is deleted.
Ensure Entitlements do not exceed rights	License Entitlement [alm_entitlement]	Checks that the total number of entitlements for the related license doesn't exceed the number of rights given by the license when an entitlement is created.
GenerateAssets	Model Categories [cmdb_model_category]	Executes a scheduled script job to create assets for configuration items.
Inherit information from parent	Asset [alm_asset]	Assigns some parent values to the asset when assigning a new parent to an asset.
Managed Stockroom for Vendor	Stock Rule [alm_stock_rule]	Validates that a vendor replenishing stock rule has a stockroom selected and the stockroom has an related manager with a valid email address.
Mandate allocated to or assigned to	License Entitlement [alm_entitlement]	Makes a value in either the Allocated to field or the Assigned to field required.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Base Asset Management business rules (continued)

Name	Table	Description
Merge Records	Consumable [alm_consumable]	Merges consumables that have matching fields and aren't In Transit into one record containing the total count.
Null out asset on insert and stay	Configuration Items [cmdb_ci]	Clears the Asset field on insert when the field includes an asset that has a CI.
Null out Ci on insert and stay	Asset [alm_asset]	Nulls out the asset field so a new asset is created for the CI when an insert is performed on an existing CI.
Populate reserved for field	Transfer Order Line [alm_transfer_order_line]	If the transfer order line has an related request line, this business rule populates the related asset's Reserved for field with the appropriate information from the request line.
Push Status to Asset/ Consumable	Transfer Order Line [alm_transfer_order_line]	Changes the corresponding asset to reflect the current state of transit when a transfer order line moves to another state.
Release Asset on TOL cancel/ delete	Transfer Order Line [alm_transfer_order_line]	Places the corresponding asset back into stock and unsources the part requirement when a transfer order line in the draft state is canceled or deleted.
Rollup TOL cancellation to TO	Transfer Order Line [alm_transfer_order_line]	Signals to the corresponding transfer order that the transfer order line has been canceled.
Salvage value must be less than cost	Asset [alm_asset]	Prevents saving an asset record if the salvage value is greater than the cost.
Sanity check on pre-allocated	Asset [alm_asset]	Prevents creation or update of pre-allocated assets if they don't satisfy the conditions to be pre-allocated.
Set Class	License Entitlement [alm_entitlement]	Sets the class for this entitlement depending on the entitlement is assigned or allocated.
Set Transfer Order Type	Transfer Order [alm_transfer_order]	Sets the type of the transfer order depending on whether there's a related service order or work order task.
Sync model category	Product Models [cmdb_model]	When the model category changes, this business rule creates assets if they didn't previously exist for configuration items associated with the model.
Transfer Order Stockroom Rules	Transfer Order [alm_transfer_order]	Prevents the From stockroom field from being changed if the transfer order has multiple transfer order lines.
Transition reserved to assigned	Asset [alm_asset]	Populates the Assigned to field with the value from the Reserved for field when the asset is in the appropriate state.
Trickle information	Asset [alm_asset]	Updates components of an asset to reflect any changes that have been made to the asset record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Base Asset Management business rules (continued)

Name	Table	Description
down to components		
Update Asset fields on change	Configuration Items [cmdb_ci]	Synchronizes fields so changes made on the Configuration Item form trigger the same update on the corresponding Asset form, ensuring consistent reporting. You must update statuses on the Asset form.
Update CI fields on change	Asset [alm_asset]	Synchronizes fields so changes made on the Asset form trigger the same update on the corresponding Configuration Item form, ensuring consistent reporting.
Update location as needed	Asset [alm_asset]	Updates the location of the asset, if the asset is set to a new stockroom or assigned to a new user.
Validate Field Agent Type	Stockroom [alm_stockroom]	Ensures that you don't create a stockroom of the type Field Agent without Work Management or Field Service Management activated. Allows for only one personal stockroom per user.
Validate TOL and check availability	Transfer Order Line [alm_transfer_order_line]	Validates changes made to the transfer order line and checks the availability of the assets to be transferred in the specified stockroom.
Validate transfer order	Transfer Order [alm_transfer_order]	Validates that the Delivery by date isn't earlier than the current date.
Validate Unique Users	Default Stockroom [alm_user_stockroom]	Prevents the creation of multiple records with the same user.
Verify Entitlement (Allocated)	License Entitlement [alm_entitlement]	Ensures that the allocation of the entitlement follows the allocation condition on the license when a condition exists.
Verify Entitlement (Assigned)	License Entitlement [alm_entitlement]	Ensures that the assignee of the entitlement follows the assignment condition on the license when a condition exists.
Verify Entitlements (Allocated)	Software License [alm_license]	Ensures that the allocations of all the license's entitlements follow the allocation condition on the license when a condition exists.
Verify Entitlements (Assigned)	Software License [alm_license]	Ensures that the assignees of all the license's entitlements follow the assignment condition on the license when a condition exists.
Verify Not Field Agent	Default Stockroom [alm_user_stockroom]	Verifies that the selected default stockroom isn't of the Field Agent type.

Installed with Model Management

Several types of components are installed with Model Management.

Demo data is available with Model Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Business rules installed with Model Management

Model Management uses a number of business rules.

Name	Table	Description
Abort action if no license type	[cmdb_software_product_model]	Ensures that a license type (not a license type group that cannot be handled by counters) has been selected.
Calculate display_name	Product Model [cmdb_model]	Sets the **Display name** field when any of the following field values change: **Manufacturer**, **Name**, **Version**, **Edition**. The display name differs depending on whether the *glide.cmdb_model.display_name.shorten* property is set to **true** or **false**.
Date validation	[cmdb_m2m_downgrade_model]	Ensures that the Start date is before the End date.
Enforce CI Rules	[cmdb_model_category]	Ensures that categories that track assets as consumables or software licenses do not have a CI class.
Flag parent as bundle on creation	[cmdb_m2m_model_component]	Flags a model that has components as a bundle.
License Type - Fullname	[cmdb_sw_license_calculation]	Computes the full name of the license type.
License validation	Software Upgrade and Downgrades [cmdb_m2m_downgrade_model]	Prevents software upgrades and downgrades from being duplicated and prevents having duplicate upgrades and downgrades for the same license where duplication also involves having the same dates. Also ensures that both the **Upgrade parent** and **Downgrade child** fields are mandatory and that if the **License** field is not empty, either **Upgrade parent** or **Downgrade child** must be equal to the license.model.
Protect cmdb_ci_class	[cmdb_model_category]	Prevents CI class from being changed after creation.
Protect cmdb_ci_class on insert	[cmdb_model_category]	Prevents creation of a category if another category already exists for the chosen CI class.
Protect Contract	[cmdb_model_category]	Prevents changes to the Contract model category record.
Set parent's main component link	[cmdb_m2m_model_component]	Populates a read-only reference from the bundle to the component when a bundle component is selected as the main component.
Unflag parent on last delete	[cmdb_m2m_model_component]	Removes the bundle flag from a model when the last component is deleted from the bundle.
Update model category	[cmdb_ci]	Updates the model categories for the associated model if the model is not already associated with the CI's model category.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name	Table	Description
Validate record before creation	[cmdb_m2m_model_component]	Ensures that a component is not already in a bundle when an attempt is made to add the component to a bundle.

Client scripts installed with Model Management

Model Management includes a number of client scripts.

Name	Table	Description
Clear models not matching license	[cmdb_m2m_downgrade_model]	Clears the **Upgrade parent** and **Downgrade child** fields when the **License** field is changed to a license and neither the upgrade or downgrade fields match the license model.
Constraints based on asset class	[cmdb_model_category]	Enables or disables bundling options based on the asset class of the category.
Hide sections when needed	[cmdb_model]	Shows and hides sections according to what is relevant for a given model.
model_category change	[cmdb_model]	Ensures compatibility of classes between the several categories referenced by the same model (client part).
Populate downgrade from license	[cmdb_m2m_downgrade_model]	Sets the downgrade child to the software model on the referenced license when an upgrade is selected. Only sets the downgrade to the license if the license is not empty.
Populate upgrade from license	[cmdb_m2m_downgrade_model]	Sets the upgrade parent to the software model on the referenced license when a downgrade is selected. Only sets the upgrade to the license if the license is not empty.

Properties installed with Model Management

Model Management includes the property *`glide.cmdb_model.display_name.shorten`*.

Name	Description
`glide.cmdb_model.display_name.shorten`	When set to **true**, generates shorter display names for models by eliminating duplication of the manufacturer name. Consider the following model, for which **Manufacturer** is set to **Spotify** and **Name** is set to **Spotify Premium**. The **Display name** field is set as follows, based on the property setting.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name	Description
	• false: Display name is Spotify Spotify Premium • true: Display name is Spotify Premium For software models, the edition and version are also included in the name, if they are specified. • Type: true | false • Default value: false • Location: System Properties [sys_properties] table

Script includes installed with Model Management

Model Management includes script includes.

Name	Description
ModelAndCategoryFilters	Refines reference qualifiers for models and model categories based on class.
ModelCategoryCheck	Ensures compatibility of classes between the several categories referenced by the same model.

Tables installed with Model Management

Model Management includes numerous tables.

Table	Description
Application Model [cmdb_application_product_model]	Stores models used to describe software application products.
Consumable Model [cmdb_consumable_product_model]	Describes consumable product models.
Contract Model [cmdb_contract_product_model]	Stores all contract models.
Depreciation [cmdb_depreciation]	Stores asset depreciation patterns.
Hardware Model [cmdb_hardware_product_model]	Describes hardware product models.
Model Category [cmdb_model_category]	Defines groups of assets, consumables, product bundles, and configuration items.
Model Compatibility [cmdb_m2m_model_compatibility]	Stores many-to-many relationship between two models signifying their compatibility with one another.
Model Component [cmdb_m2m_model_component]	Stores many-to-many relationship between two models signifying that they form a bundle.
Product model [cmdb_model]	Describes all kinds of product models.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Software License Calculation [cmdb_sw_license_calculation]	Defines commonly used software licensing patterns.
Software Model [cmdb_software_product_model]	Describes software product models.
Software Suite [cmdb_m2m_suite_model	Stores many-to-many relationship between two models that defines elements of a software suite.
Software Upgrade and Downgrades [cmdb_m2m_downgrade_model]	Stores many-to-many relationship between two models signifying that being licensed for one model grants rights to the other as well.

UI policies installed with Model Management

Model Management includes UI policies.

Name	Table	Description
Hide unverified	Model Category [cmdb_model_category]	Shows the **Enforce CI verification** field if the **Asset class** and **CI class** fields are not empty.
Lock fields for Contract and Work Lock fields for Contract	Model Category [cmdb_model_category]	Sets all fields on the Model Category form to read-only if the **Name** is **Contract** or, **Work Order** or **Work Task**.
Protect model category	Product Model [cmdb_model]	Makes the **Model categories** field mandatory and read-only if it contains any of the following values: **Software License**, **Contract**, **Work Order**, **Work Task**.
Show is an option if Oracle	Software Model [cmdb_software_product_model]	Shows the **Is an option** field if the selected **Manufacturer** name starts with **Oracle**.

User roles installed with Model Management

Model Management includes user roles.

Role	Contains Roles	Description
category_manager	model manager	Can create, edit, and delete model categories.
model_manager	none	Can create new CMDB models. The model manager role can control the base models and any model extensions that are not hardware, software, or consumables. Hardware and consumable models are controlled by the asset manager (asset) role. Software models are controlled by the software asset manager (sam) role.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Transfer order line fields

Transfer order line form and related fields description.

Transfer order line form

Field	Description
Number	Internal unique number identifying the transfer order line.
Transfer Order	The transfer order to which the transfer order line belongs.
Model	Model of the items requested by the transfer order line. For example, a printer. If the Asset field is filled out first, the Model field is automatically filled in with the model corresponding to the asset.
Quantity requested	Number of items requested by the transfer order line. For example, 3 computers are requested to be transferred.
Quantity received	Number of items already received. For example, 3 keyboards are transferred, 2 are received.
Stage	Current stage of the transfer order. Transfer order lines can only be created when a transfer order is in **Draft** stage.
Request line	Requested item to associate with the transfer order line.
Asset	Asset requested by the transfer order line. For example, a specific printer. The asset can filter on stockrooms. **Note:** To create transfer order for an asset, the asset must have a state of **In Stock** and a substate of either **Available** or **Pre-allocated**.
Quantity remaining	Number of items yet to be received. For example, 3 keyboards had been requested, 2 are received, 1 is remaining.
Quantity returned	Number of items that already needed to be returned.

Related topics

Transfer assets using transfer orders

Summary of transfer order line tasks

As assets move through the transfer process, the stage of a transfer order is updated based on the individual transfer order lines tasks.

Transfer order line tasks

Transfer order line stages	Description
Draft	When a transfer order line is created for the asset. On the asset form, the **State** field value remains **In stock**, and the **Substate** field value is updated to **Pending transfer**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Transfer order line tasks (continued)

Transfer order line stages	Description
Requested	This task is created first for the transfer order line. On the asset form, the **State** field value remains **In stock**, and the **Substate** field value remains **Pending transfer**.
Shipment Preparation	After the **Requested** task is closed, this task is created. This task deals with preparing the transfer order line for shipment. Specify the values for the shipment tracking fields such as **Shipping carrier**, **Vendor**, **Tracking number**, and **Ship date**. On the asset form, the **State** field value remains **In stock**, and the **Substate** field value remains **Pending transfer**.
In Transit	After the **Shipment Preparation** task is closed, this task is created. On the asset form, the **State** field value changes to **In transit**, and the **Substate** field value is updated to **Reserved**.
Received	After the **In Transit** task is closed, this task is created. On the asset form, the **State** field value changes to **In stock**, and the **Substate** field value is updated to **Available**. The **Stockroom** field value is updated as the asset is received in the destination stockroom.
Delivered	After the **Received** task is closed, this task is created. After you close the **Delivered** task, the transfer order line is completed. On the asset form, the **State** field value remains **In stock** and the **Substate** field value is updated to **Reserved**.

Related topics

- Transfer order line asset tracking
- Transfer order line asset tracking of non-consumables
- Transfer order line asset tracking consumables
- Transfer order flow

Read-only and client script modifiable fields in Asset Management tables

Comprehensive reference of Asset Management table fields that are restricted from UI editing and those which can be modified using client scripts.

Strict read-only fields in Asset Management tables

Strict read-only fields

Table	Fields
Asset	• Active transfer order [active_to] • Configuration Item [ci]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only fields (continued)

Table	Fields
alm_asset	• Depreciated amount [depreciated_amount] • Model component [model_component_id] • Old status [old_status] • Old substatus [old_substatus] • Pre-allocated [pre_allocated] • Product instance identifier [product_instance_id] • Residual value [residual] • Residual date [residual_date] • skip_sync
Asset Creation Queue [alm_asset_creation_queue]	• Comments [comments] • Source ID [source_id] • Table [table]
Consumable [alm_consumable]	Planned for disposal [planned_for_disposal]
alm_domain_asset_process_setting	• Active [active] • Domain [sys_domain]
Fixed Assets [alm_fixed_assets]	• Residual Value [residual] • Total cost [total_cost] • Total depreciation [total_depreciation]
Hardware [alm_hardware]	Eligible for refresh [eligible_for_refresh]
Template Task [alm_template_task]	Class [sys_class_name]
Transfer Order [alm_transfer_order]	• Number [number] • Requested date [requested_date] • Return from [return_from_transfer_order]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only fields (continued)

Table	Fields
	• Stage [stage] • Type [type]
Transfer Order Line [alm_transfer_order_line]	• Number [number] • Quantity calculated [quantity_calculated] • Quantity received [quantity_received] • Quantity remaining [quantity_remaining] • Quantity returned [quantity_returned] • Stage [stage] • Transfer_order [transfer_order]
Transfer Order Line Subtask [alm_transfer_order_line_subtask]	• Subtask name [subtask_name] • Task [task]
Transfer Order Line Task [alm_transfer_order_line_task]	• Model category [model_category] • Stage [stage] • Template task [template_task] • Transfer order line [transfer_order_line]
Content Audit [asset_content_audit]	• Comments [comments] • Document key [document_key] • Field name [field_name] • New internal value [new_internal_value] • New value [new_value] • Old Internal value [old_internal_value] • Old value [old_value] • Class [sys_class_name] • Table name [table_name]
Asset Job Log [asset_job_log]	Number [number]
Asset Job Log Details [asset_job_log_detail]	• Asset job log [asset_job_log] • Number [number]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only fields (continued)

Table	Fields
Asset Reclamation Request [asset_reclamation_request]	• Flow context [flow_context] • Number [number] • State [state]
Contract [ast_contract]	• Approval History [approval_history] • license_quantity_entitled • number • process • Has rate card [ratecard] • State [state] • Terms and conditions [terms_and_conditions]
Condition [clm_condition_checker]	table
Contract History [clm_contract_history]	• Ends [ends] • Starts [starts] • Terms and Conditions [terms_and_conditions]
Asset Covered [clm_m2m_rate_card_asset]	Rate Card [rate_card]
Terms and Conditions [clm_terms_and_conditions]	• Contract [contract] • Number [number] • Used [used]
Product Model [cmdb_model]	• Main component [main_component] • Catalog Item [product_catalog_item]
Model Category [cmdb_model_category]	Bundle [bundle]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only fields (continued)

Table	Fields
Model Lifecycle [cmdb_model_lifecycle]	• Current lifecycle phase [current_lifecycle_phase] • Source [source] • Class [sys_class_name]
ITAM Licensing Resource Counts [itam_licensing_resource_counts]	• Active Subscription Entitlement [active_subscription_entitlement] • Is Aggregated [is_aggregated]
Vendor Catalog Item [pc_vendor_cat_item]	Product Catalog Item [product_catalog_item]
Purchase Order [proc_po]	• Initial request [init_request] • Number [number] • Ordered [ordered] • Purchase order type [purchase_order_type] • Received [received] • Source ID [source_id] • Source table [source_table] • Status [status] • Total cost [total_cost]
Purchase order line items [proc_po_item]	• Number [number] • Ordered [ordered] • Purchase order [purchase_order] • Received [received] • source_id [Source ID] • Source table [source_table] • Status [status] • Stock order [stock_order] • total_list_price
Receiving Slip [proc_rec_slip]	• Number [number] • Received [received]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Strict read-only fields (continued)

Table	Fields
Receiving Slip Line [proc_rec_slip_item]	• Number [number] • Received [received] • Receiving Slip [receiving_slip]
Important Action Card [sn_itam_recomm_action_card]	Source [source]
Important Actions Dashboard Result sn_itam_recomm_dashboard_result	• Dashboard [dashboard] • Last calculated on [last_calculated_on] • Schedule item [schedule_item] • Domain [sys_domain]
Important Actions Setup sn_itam_recomm_setup	Source [source]
Important Actions Setup Result [sn_itam_recomm_setup_result]	• Important action setup [action_setup] • Active [active] • Duration [duration] • Last calculated on [last_calculated_on] • Query result [query_result] • Domain [sys_domain]
Important Actions Workspace [sn_itam_recomm_workspace]	Results deletion in progress [results_deletion_in_progress]
Zero Touch Refresh Fulfillment Request sn_itam_ztr_fulfillment_req	• Customer request number [customer_request_number] • Number [number]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Client script modifiable fields in Asset Management tables

Client script modifiable fields

Table	Fields
Transfer Order [alm_transfer_order]	• From location [from_location] • To location [to_location]
Contract ast_contract	Substate [substate]
Purchase order line items proc_po_item	Total cost [total_cost]

Contract Management

Manage and track contracts with the ServiceNow® Contract Management application.

A contract is a binding agreement between two parties. In the ServiceNow platform, contracts contain detailed information such as the following:

- Contract number
- Contract start and end dates
- Active status
- Terms and conditions statements
- Documents
- Renewal information
- Financial terms

Contract Management is active by default. If the Cost Management plugin is activated, the Contract Management application integrates with the Cost Management plugin to associate contracts with costs and determine the total cost of ownership. You can track recurring expenses with expense lines. An administrator can activate the Cost Management plugin.

If you are using the Software Asset Management plugin, use the Software Licenses option.

Related topics

Create a new expense line

Terms and conditions

Software Asset Management

Use the Asset Contract Overview module

You can view information about your contract status in the Contract Management Overview module.

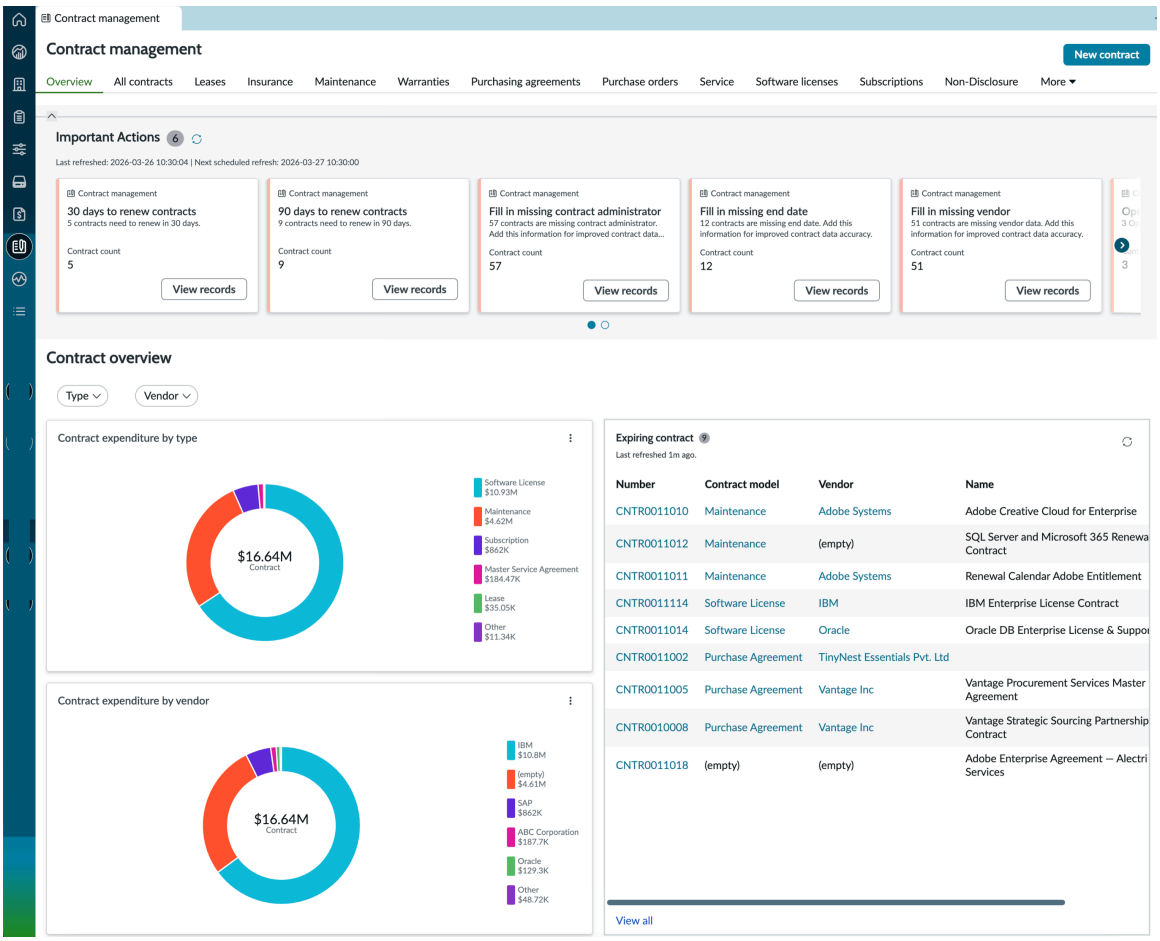
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: asset, contract_manager

About this task
Because the Contract Management Overview module is a type of homepage, you can add, delete, and rearrange reports on the page.

Procedure
1. Navigate to **All** > **Contract** > **Overview**.
2. Click elements within the reports to obtain more information.

Example
For example, click any of the colored bars in the **Contract Expenditure by Type** bar chart to see detailed information.



Components installed with Contract Management
Several types of components are installed with Contract Management.

Demo data is available.

Tables installed with Contract Management
Tables are added with Contract Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Table	Description
Asset Covered [clm_m2m_contract_asset]	Lists the assets covered by a contract. An asset can be covered by multiple contracts and a contract can have multiple assets. **Note:** The contract_manager, itil, inventory_admin, or procurement_user role can only access the reports. You must activate the Procurement (com.snc.procurement) plugin for the procurement_user role and the Hardware Asset Management Professional (com.sn_hamp) plugin for the itil and inventory_admin roles.
Asset Covered [clm_m2m_rate_card_asset]	Lists the rate cards that apply to an asset.
Condition [clm_condition_checker]	Lists the conditions and values for each condition checker.
Condition Checks [clm_condition_check]	Stores conditions and values that modify specified condition fields.
Contract [ast_contract]	Stores contract information.
Contract History [clm_contract_history]	Stores a copy of the contract when the start date, end date, or terms and conditions change.
Terms and Conditions [clm_terms_and_conditions]	Lists the terms and conditions used by contracts.
Terms and Conditions [clm_m2m_contract_and_terms]	Lists all terms and conditions available for use with contracts.
Users Covered [clm_m2m_contract_user]	Lists the users covered by contracts.

User roles installed with Contract Management

A user role is added with Contract Management.

Role	Contains Role	Description
contract_manager	financial_mgmt_user	Manages the contract life cycle. Can create, edit, and delete contracts.

Script includes installed with Contract Management

Script includes are added with Contract Management.

Name	Description
ConditionChecks	Checks for matching conditions, such as for contract expirations and license compliance, defined in the Condition Checks [clm_condition_check] table.
ContractManagementUtils	Utilities that manage contract management actions, such as state transitions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Client scripts installed with Contract Management

Client scripts are added with Contract Management.

Name	Table	Description
Calculate Tax Cost - Base cost	Contract [ast_contract]	Calculates the **Tax cost** field and the **Total cost** field on the Contract form when the **Payment amount** field changes.
Calculate Tax Cost - Sales tax	Contract [ast_contract]	Calculates the **Tax cost** field and the **Total cost** field on the Contract form when the **Sales tax** field changes.
Calculate Tax Cost - Tax rate	Contract [ast_contract]	Calculates the **Tax cost** field and the **Total cost** field on the Contract form when the **Tax rate** field changes.
Ensure discount is valid percent	Contract [ast_contract]	Ensures that the **Discount** field does not contain a value less than zero or greater than 99.
Renew Cost Adjustment	Contract [ast_contract]	Sets the **Percentage** field on the Contract form to zero if the user sets a dollar amount for the cost adjustment.
Renew Cost Percentage	Contract [ast_contract]	Sets the **Amount** field on the Contract form to zero if the user enters a percentage for the cost adjustment.
Tax exempt/ rate	Contract [ast_contract]	Changes all tax-related fields on the Contract form to read-only if the **Tax Exempt** check box is selected.
Tax rate/exempt	Contract [ast_contract]	Changes all tax-related fields on the Contract form to writeable if the **Sales Tax** check box is selected.

Business rules installed with Contract Management

Business rules are added with Contract Management.

Name	Table	Description
Calculate projected costs (Reports)	Contract [ast_contract]	Calculates the projected monthly and annual costs for a contract when costs or payment schedule changes.
Calculate totals with tax	Contract [ast_contract]	Calculates the **Tax cost** and **Total cost** fields for a contract when the contract is created or updated.
Contract history	Contract [ast_contract]	Stores history when the start, end, or terms and conditions of a contract change.
Create approval record	Contract [ast_contract]	Updates contract **Terms and Conditions** and starts the contract approval workflow when a contract is sent for review.
Flag terms and conditions	Terms and Conditions [clm_m2m_contract_and_terms]	Sets the **Use** flag on a Terms and Conditions record to **true** after the record is associated with a contract or to **false** after the record is disassociated from a contract.
Activate count for manual licenses	Software License Instance [ast_license_software_instance]	Calculates and updates the number of computers a particular license is installed on when a software license instance is created or deleted.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Name	Table	Description
Manage contract lifecycle	Contract [ast_contract]	This business rule: • Updates the end date of a contract when a contract extension has been approved. • Renews the contract, updating its start date, end date, and base cost (if cost adjustments must be applied) when a contract renewal has been approved and the renewal has reached its start date. • Runs the condition checks to evaluate if dates need to be changed when a contract is approved, or an extension or renewal is approved, or the start or end dates have changed.
Post outage to news	Service [cmdb_ci_service]	Posts a news article on the knowledge table when there is an outage.
Update contract cost per asset	Asset Covered [clm_m2m_contract_asset]	Updates the cost per unit value based on the total cost and number of assets associated to the contract.
Update contract lifetime cost	Contract Rate Card [fm_contract_rate_card]	Calculates the lifetime cost of the contract by calculating the sum of the contract expense lines.
Updates after contract dates change	Contract [ast_contract]	Updates the **Date added** and **Date removed** fields for all assets and users associated with a contract if the contract end date changes.
Updates after rate card dates change	Contract Rate Card [fm_contract_rate_card]	Updates the related contract assets and users linked to the rate card when the end date is changed.
Verify contract's start and end dates	Contract [ast_contract]	Validates contract start and end dates and contract renewal start and end dates.
Verify purchase agreement discount price	Contract [ast_contract]	For contracts with the contract model **Purchase Agreement**, the business rule validates that the **Discount** field does not contain a value less than zero or greater than 99.

Contract renewal workflow

Use the contract renewal workflow to renew contracts that are nearing their expiry date or are already expired. This workflow enables you to renew contracts through a streamlined and managed process.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Renew your contracts by creating, validating, approving, and activating a contract record that references the original contract. This workflow enables you to manage related entities like hardware assets, software entitlements, terms and conditions, and rate cards.

Note: The contract renewal workflow supports Software license, Subscription contract, Maintenance, and Warranty contract models.

Complete the following tasks in the contract renewal workflow to renew your contracts:

1. Contract renewal request: Create a contract renewal request for contracts that are nearing their expiry date or are already expired.
2. Contract selection: Renew multiple child contracts under the parent contract.
3. Build renewal: Supply the contract renewal information.
4. Asset selection: Add or remove hardware or enterprise assets from the contract renewal process, and view the assets carried over to the new contract.
5. Software assets selection: Add or remove software entitlements that you want to include in the contract renewal process, and view the entitlements carried over to the new contract.
6. Terms and conditions: Update the terms and conditions in your new contract, and view the terms and conditions carried over to the new contract.
7. Rate cards: Add rate card details to the new contract to track contract expenses.
8. Renewal confirmation: Review the renewal details after completing all the details of a contract.
9. Renewal approval: Approve or reject a contract renewal request for all Contract Renewal Request Lines.
10. Renewal purchase order: Receive the purchase order for assets covered in the contract.

Note:

- You can't edit a task after you close it.
- You can cancel a contract renewal process for a Contract, Contract Renewal Request, Contract Renewal Request Lines, and Contract Renewal tasks. For more information, see Results of canceling a contract renewal process.

Prerequisites

Before using the contract renewal workflow, you must complete the following prerequisites:

- Activate the Software Asset Management Professional (com.snc.samp) plugin on your ServiceNow instance.

  If you want to manage hardware or enterprise asset contracts, request and install the Hardware Asset Management or Enterprise Asset Management application from the ServiceNow Store instead.

- Enable the *sn_contract_enable_renewal_flow* system property.

  Note: If you're already using Software Asset Management, Hardware Asset Management, or both, this system property is set to false. If you're a new user, this system property is set to true.

Domain separation

Domain separation with data separation is supported for the contract renewal workflow with the following requirements:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The request is created in the domain of the contract that initiated the renewal process.
- Request lines are in the domain of the contract of the request line.
- Tasks are created in the domain of the contract being renewed.

The *sn_contract_enable_renewal_flow* system property also supports domain separation.

Create a contract renewal request

Create a contract renewal request for contracts that are nearing their expiry date or are already expired.

Before you begin

Role required: contract_system_admin, asset, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task

You can create a renewal request only for Maintenance, Warranties, Subscriptions, and Software Licenses. If you have installed only the Software Asset Management application, you can renew Subscriptions, Maintenance, and Software Licenses contracts. If you have installed only the Hardware Asset Management application, you can renew Maintenance and Warranties contracts. If you have installed only the Enterprise Asset Management application, you can renew Maintenance and Warranties contracts.

Procedure

1. Open the list of contracts that you want to renew.
   - If you are using the core UI, navigate to **All** > **Contracts** > **Contract Renewal**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **Overview** tab. In the Contract overview section, locate the Expiring contract widget.

     Alternatively, open the Contract management view and then select a tab for a contract type, such as **All** or **Maintenance**.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **Overview** tab. In the Contract overview section, locate the Expiring contract widget.

     Alternatively, open the Contract and lease management view and then select a tab for a contract type, such as **All** or **Maintenance**.
2. Select the contract that you want to renew with a type of either Maintenance, Warranties, Subscriptions, Software Licenses, or Service.
3. Click **Renew** for the selected contract.
4. Submit the contract renewal request.
   - If you are using the core UI or Hardware Asset Workspace, click **OK**.

     The contract renewal request includes the following information:
     - An auto-generated unique number
     - The Stage indicating the type of task in the contract renewal process

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Reference to the contract for which you have requested the renewal
- Date and time when the request was created

- If you are using the Enterprise Asset Workspace, the Renew the Contract dialog box appears. In the dialog box, fill in the fields and then click **Submit for review**.

Renew the Contract dialog box

Field	Description
Approver	User who approves or rejects the contract renewal request.
Options	Duration of the contract renewal.
Renewal start date	Date on which the contract renewal begins.
Renewal end date	Date on which the contract renewal ends.
Cost adjustment type	Type of cost adjustment that is applied to the contract. The options are **Fixed**, **Manual**, and **CPI** (consumer price index).
Cost adjustment percentage	Percentage increase or decrease in the contract price. To indicate a decrease in price, enter a negative percentage. **Note:** You can specify either a cost adjustment percentage or cost adjustment amount on a contract renewal request. You cannot specify both.
Cost adjustment amount	Numerical increase or decrease in the contract price. To indicate a decrease in price, enter a negative number. **Note:** You can specify either a cost adjustment percentage or cost adjustment amount on a contract renewal request. You cannot specify both.

5. **Optional:** Select the **Contract Renewal Request Lines** tab to view the parent Contract Renewal Request Line or existing and valid child contracts under the parent contract. A contract renewal request line is created for each contract that is being renewed.
6. **Optional:** View all open contract renewal flow tasks and the details of each contract renewal task by selecting the **Open Tasks** tab.
7. **Optional:** View all contract renewal flow tasks and the details of each contract renewal task by selecting the **All Tasks** tab.

Result

The substate of the contract that is being renewed is set to **Renewal in process**.

What to do next

If the parent contract doesn't have child contracts, select the Build renewal task.

If the parent contract has child contracts, select the Contract selection task.

Renew multiple child contracts

Renew multiple child contracts under the parent contract by using the Contract selection task.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: contract_system_admin, asset, or contract_manager

About this task
This task is created only when the contract that you want to renew has valid child contracts supported by the contract renewal workflow that are not already renewed or in draft state.

Procedure
1. On the Contract form, select the **Contract Renewal Requests** tab in the Related Links section to view the list of contract renewal requests.
2. Select a renewal request.
3. View all the child contracts linked to the selected contract by selecting the **Renewal contracts** tab on the Contract Renewal Task form.
4. Indicate the child contracts you want to renew.
   a. Open the record by selecting the preview icon ⓘ besides a child contract.
   b. Choose whether to include child contracts for renewal by entering Yes or No in the **Renewal Decision** field.
   You must provide a value for the **Renewal decision** field for each child contract.
5. Select **Update**.
   The Renewal decision column in the **Renewal contracts** tab displays your decision.
6. Select **Close Task**.

Result
The contract renewal request lines for parent and child contracts are listed in the Contract Renewal Request Lines tab. Each contract request line has its own flow of tasks.

What to do next
Supply contract renewal information

Supply contract renewal information

Supply the contract renewal information by completing the Build renewal task.

Before you begin
Role required: contract_system_admin, asset, or contract_manager

About this task
Each contract renewal request line has its own flow of tasks.

Procedure
1. On the Contract Renewal Request Line form, select the Build renewal task number.
2. On the Contract Renewal Task form, select the **Renewal contract details** tab.
3. Provide the contract renewal information.

   You must fill in all the required fields before you close the task. If you are renewing the child contract, you must provide the end date and start date within the range of the start date and end date of the parent contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The Contract approver field is displayed only for the parent contract. The same Contract approver value is filled in automatically for any child contracts.

4. Select **Close Task**.

Result
New draft contracts are created.

What to do next
Add or remove assets for a contract renewal

Add or remove assets for a contract renewal

Add or remove hardware or enterprise assets from the contract renewal process. You can also view the hardware or enterprise assets carried over to the new contract.

Before you begin
To add or remove hardware assets from the contract renewal process, request the Hardware Asset Management application from the ServiceNow Store. To add or remove enterprise assets from the contract renewal process, request the Enterprise Asset Management application from the ServiceNow Store.

Role required: contract_system_admin, asset, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task
The active and valid assets from the contract that are being renewed are carried over to the new contract, and are listed in the Assets Covered tab. Valid hardware and enterprise assets are the assets that are not removed from the contract before the end date, and are in the following states or substates:

- State
  - In stock
  - In transit
  - In maintenance
  - In use
- Substate
  - Available
  - Reserved
  - Pending transfer
  - None
  - Pending repair
  - Pending install

Invalid assets are not carried over to the draft contract and you must add them manually.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Open the assets selection task or contract for which you want to add assets.
   - If you are using the core UI or Hardware Asset Workspace, select the assets selection task number on the Contract Renewal Request Line form.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view. Select the **All contracts** tab and then open the contract that you want to add assets to.
2. Select the **Assets Covered** tab.
3. If you are using the core UI or Hardware Asset Workspace, click **Edit**.
4. Update the hardware or enterprise assets in the contract.

Interface	Action
Core UI	Indicate the assets that you want to cover by moving assets to the **Assets Covered List** or removing them.
Hardware Asset Workspace	Add or remove assets from the existing list to indicate the assets you want to cover. ○ To add an asset, select **Add** and provide the required asset information. ○ To remove an asset, select it and select **Remove**.
Enterprise Asset Workspace	Add or remove assets from the existing list to indicate the assets you want to cover. ○ To add an asset, click **Add**. In the Add assets dialog box, select the check box for each asset that you want to add and then click **Add**. ○ To remove an asset, select the check box for that asset and then click **Remove**.

5. Select **Save**.
6. Edit the renewal cost of the assets.

   Note: This step is applicable only if you are using the core UI or Hardware Asset Workspace.

   a. Select the asset that you want to update the renewal cost for.
   b. In the **Renewal cost** field, update the renewal cost of the asset.
   c. Click **Update**.
7. Click **Save**.
8. If you are adding assets through the asset selection task on the Contract Renewal Request Line form, click **Close Task**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
The Payment amount field in the Financial tab of the draft contract shows the total renewal cost of the hardware or enterprise assets you selected.

What to do next
Add or remove entitlements for a contract renewal

Add or remove entitlements for a contract renewal

Add or remove software entitlements that you want to include in the contract renewal process by using the Software assets selection task. You can also view the entitlements carried over to the new contract.

Before you begin
The Software Asset Management Professional (com.snc.samp) plugin must be activated.

Role required: contract_system_admin, sam_user, contract_manager

About this task
The entitlements with the following license types are carried over to the new contract:

- Perpetual and maintenance
- Perpetual and software assurance
- Only perpetual

Procedure
1. On the Contract Renewal Request Line form, select the Software assets selection task number.
2. Create an entitlement if you don't have any entitlements carried over to the draft contract.

   a. On the Contract Renewal Task form, select **Create Entitlement** in the **Planned Entitlements** tab.

   b. On the Software Entitlement form, fill in the required fields.

      For more information, see Software entitlement fields.

   c. Select **Save**.

      You can publish this entitlement after you complete the renewal request because this entitlement is associated with an existing renewal process.

   The entitlement is now listed in the Planned Entitlements list.
3. **Optional:** Update the existing entitlements for the draft contract.

Interface	Action
Core UI	**a.** Select **Edit**. **b.** Indicate the entitlements that you want to cover by moving them to the **Planned Entitlements** or removing them.
Hardware Asset Workspace	(Optional) Add or remove entitlements to indicate the entitlements you want to cover.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
	○ To add an entitlement, select **Add** and pro vide the required information. ○ To remove an entitlement, select it and se lect **Remove**.

4. Select **Save**.
5. Select **Close Task**.

What to do next
Update terms and conditions

Update terms and conditions

Update the terms and conditions in your new contract. You can also view the terms and conditions carried over to the new contract.

Before you begin
Role required: contract_system_admin, asset, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

Procedure

1. Open the task or contract for which you want to add terms and conditions.
   - If you are using the core UI or Hardware Asset Workspace, select the Terms and conditions task number on the Contract Renewal Request Line form. Select the **Renewal contracts terms** tab and then click **Edit**.
   - If you are using the Enterprise Asset Workspace, navigate to the Contract and lease management view and then select the **All contracts** tab. Open the enterprise asset contract that you want to add terms and conditions to and then select the **Terms and Conditions** tab.
2. Update the terms and conditions in the contract.

Interface	Action
Core UI	Indicate the terms and conditions that you want to cover by moving them to the **Terms and Conditions List** or removing them.
Hardware Asset Workspace	Add or remove terms and conditions from the draft contract. ○ To add a term and condition, select **Add** and provide the required information. ○ To remove a term and condition, select it and select **Remove**.
Enterprise Asset Workspace	Add or remove terms and conditions from the draft contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Interface	Action
	○ To add a term and condition, click **Add**. In the dialog box, select the check box for each term and condition that you want to add and then click **Add**. ○ To remove a term and condition, select the check box for that term and condition and then click **Remove**.

3. Select **Save**.
4. If you are adding terms and conditions through the Terms and conditions task on the Contract Renewal Request Line form, click **Close Task**.

Result
Multiple terms and conditions are displayed in the **Terms and Conditions** tab of the contract.

What to do next
Add rate cards to the new contract

Add rate cards to the new contract

Add rate card details to the new contract by using the Rate cards task to track contract expenses.

Before you begin
The Cost Management (com.snc.cost_management) plugin must be active.

Role required: asset, contract_manager

About this task
The rate card details aren't carried over to the new contract.

Adding rate card details to a contract isn't a required procedure. You can close this task if you do not need to add a rate card to the draft contract.

Procedure
1. On the Contract Renewal Request Line form, select the Rate cards task number.
2. On the Contract Renewal Task form, select the **Renewal rate cards** tab.
3. Select **New**.
4. On the Contract Rate Card form, fill in the financial details.
   For a description of the field values, see Contract Rate Card form.
5. Select **Submit**.
6. Select **Close Task**.

Result
The rate card is attached to the draft contract.

What to do next
Review contract renewal details

Review contract renewal details

Review the renewal details after completing all the details of a contract by using the Renewal confirmation task. You can then either approve them or mark the details for further review.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: asset, contract_manager

About this task
This task must be completed before the contract renewal request is eligible for approval.

Procedure
1. On the Contract Renewal Request Line form, select the Renewal confirmation task number.
2. On the Contract Renewal Task form, verify the renewal details.
3. **Optional:** Review the list of entitlements in the draft contract by accessing the **Planned Entitlements** tab.
4. Determine whether to close this task.

Result of review	Action
The details are accurate	Select **Yes**.
The details are not accurate	**a.** Select **No**. **b.** On the Renewal confirmation task form, navigate to the contract by clicking the preview icon next to the Renewal contract field. **c.** Update the contract details as necessary. **d.** Navigate to the Renewal confirmation task form. **e.** Select **Yes**.

5. Select **Close Task**.

Result
When you have closed the task, the Contract Renewal Request Line processing is complete because all the contract renewal tasks are closed. The stage of the Contract Renewal Request Line is set to Awaiting approval. After all the Contract Renewal Request Lines are processed for a contract renewal request, the Approval task is created under Contract Renewal Requests.

What to do next
Approve or reject a contract renewal request

Approve or reject a contract renewal request
Approve or reject a contract renewal request for all Contract Renewal Request Lines.

Before you begin
The Renewal approver field must contain a value. If you need to change the approver, navigate to the parent contract and adjust the value there.

Role required: contract_system_admin, asset_manager (core UI and Hardware Asset Workspace only), contract_manager (core UI or Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Verify your contract renewal details.
   - If you are using the core UI or Hardware Asset Workspace, select the **Open Tasks** tab on the Contract Renewal Request form. Select the contract renewal request number to view the contract renewal details and then click **Close Task**.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view. Select the **All contracts** tab and then open the enterprise asset contract that you want to renew. View the contract renewal details in the Renewal section of the **Details** tab.

   An approval request is triggered and the substate of the draft contract changes to Under review.
2. Open the list of contract and contract renewal requests.
   - If you are using the core UI or Hardware Asset Workspace, navigate to **All** > **Contract** > **My Approvals**.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **My contract approvals** tab.
3. Select the contract renewal request waiting for approval.
4. Evaluate any contract renewal request lines and contract renewal tasks.
5. Either approve or reject the contract renewal request.

Action	Result
Approve the request by selecting Approve	○ The substate of the draft contract changes to Approved. ○ The Renewal purchase order task or the Manual purchase order task is created.
Reject the request by selecting Reject	○ The renewal request gets terminated. ○ The substate of the draft contract changes to Renewal rejected.

6. **Optional:** Go to the **Approval History** tab to view the approval or rejection history of the contract and child contracts.

What to do next

Receive a purchase order for contract assets

Receive a purchase order for contract assets

Receive the purchase order for assets covered in the contract by using the Renewal purchase order task. This task is available if you have added at least one hardware asset, created an entitlement, or selected an existing entitlement that is in the Build state.

Before you begin

This task is not created if you haven't selected or added any hardware assets or entitlements or the Procurement plugin (com.snc.procurement) is not active. You must instead manually track the financial expenses.

Role required: procurement_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. On the Contract Renewal Request form, select the **Open Tasks** tab.
2. Select the contract renewal request number.
3. Select the **Purchase orders** tab.
4. Select the purchase order number to capture the financial transactions of the contract.

   For every asset record covered under a contract, a purchase order line item is created. The cost of each purchase order is the renewal cost of each asset covered.

   The purchase order line items are created for the entitlements that are in the Build state. Each entitlement added in the Planned Entitlements tab corresponds to a unique purchase order line.
5. Select **Order**.
6. Select **Receive** to receive the purchase order for assets covered by the contract.
   Receiving the purchase order only updates the assets and does not create an entitlement.

Result

The draft entitlement is published and the status is set to In use.

The purchase order receipt is listed in the **Receiving Slips** tab.

The status of the purchase order and purchase order line items shows as Received. The state of the Renewal purchase order task automatically changes to Closed Complete. The contract renewal request flow is complete.

The substate of the old contract is set to Renewed. A contract history record is created that displays the start and end dates of the old contract and the renewed contract, and the renewal date. You can view the entire history of the contract by selecting the Contract History tab in the Related Links section.

After you receive the purchase order, the state of the renewal contract is no longer Draft and the contract becomes active. If the start date of the renewed contract has been reached but the purchase order has not been received, the status of the contract renewal request remains set to Draft. After the new contract becomes active, the old contract becomes expired and the covered assets have an end date.

Results of canceling a contract renewal process

Cancelling a contract renewal process results in a change in the state of Contract, Contract Renewal Request, Contract Renewal Request Lines, and Contract Renewal tasks.

Contract cancellation results

Canceled item	Result
Contract Renewal Request	• The entire renewal request is canceled. • The substate of the contract that is being renewed is cleared. • All the draft contracts are canceled.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Contract cancellation results (continued)

Canceled item	Result
Contract Renewal Request Line	• The Contract Renewal Request Line is canceled. • When all Contract Renewal Request Lines are canceled, the Contract Renewal Request is canceled. • The renewal of immediate child draft contracts is canceled.
Contract Renewal Task	• The Contract Renewal Task and the Contract Renewal Request Line are canceled. ○ If the Contract Renewal Request has only one Contract Renewal Request Line, the stage of the Contract Renewal Request changes to Canceled. ○ If the Contract Renewal Request has multiple Contract Renewal Request Lines, the stage of the Contract Renewal Request doesn't change. • The renewal of immediate child draft contracts is canceled. • The state of the draft contract changes to Canceled. • The state of the tasks that are already closed does not change. • The state of the open tasks changes to Closed Incomplete. • Rate cards are attached to the draft contract become inactive. • The state of the contract that was being renewed moves to the original state and the substate is cleared. • The associated entitlements with the Contract Renewal Task are removed.
Contract	• The renewal of immediate child contracts is canceled when child contracts are included in the Contract Renewal Request. • The Contract Renewal Request Line is canceled.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Contract cancellation results (continued)

Canceled item	Result
	• Any initiated Contract Renewal Request by this contract is canceled. • The purchase order of the contract and immediate child contracts is canceled.

Contract approval flow

Use the Contract Approval flow to get approval from the approver defined in the contract. You can edit the existing flow or create a flow in the graphical Workflow Studio to meet your organization's contract approval process.

Prerequisites

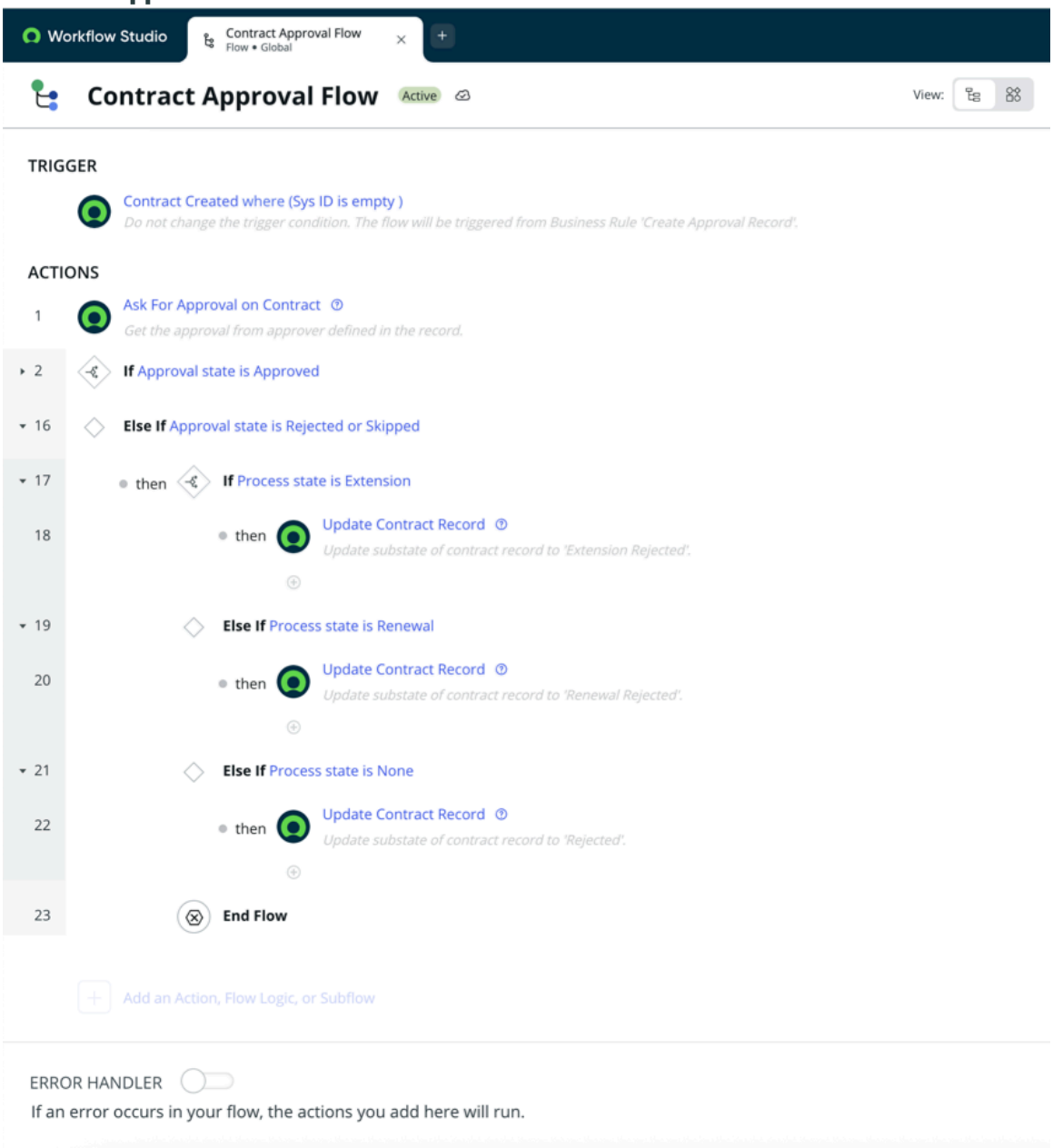
Ensure that the Contract Management (com.snc.contract_management) plugin is installed.

Contract Approval flow

Submit your contract for approval by selecting an approver in the contract record. This workflow enables you to manage the terms and conditions the contract must meet to approve a contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Contract Approval



Contract approval process

- Select an **Approver** for the contract and select **Submit for Review**. If the contract's end date is greater than the current date, an approval history record is automatically created to track the status of the approval process. For more information about sending a contract for approval, see Send the contract for approval.
- Access the contract approval history record and take an approval action. For more information about viewing the approval history for a contract, see View approval history on contracts. Based on the approval decision on the contract, the state and substate of the contract is updated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Send the contract for approval

Approve or reject a contract

View approval history on contracts

Contract Management use

Users with the contract_manager role can use the Contract Management application to create various types of contracts, such as leases, warranties, maintenance, and service.

You can add the following information to contracts.

- Assets covered by the contract
- Users covered by the contract
- Terms and conditions associated with the contract
- Other documents related to the contract

Track the various stages of a contract from draft to closure by viewing contract history and running reports. Adjust, extend, and renew active contracts.

Contract life cycle

From creation until closure, contracts follow a life cycle that determines which fields can be edited.

When a contract is in **Draft** state, almost all fields on the contract record can be edited. After a contract moves past the **Draft** state, certain date, renewal, extension, and financial fields become read-only. The **State** field and **Substate** field are read-only.

The **Contract Compliance Checks** schedule job runs on the Contract [ast_contract] table automatically each night. For more information about the scheduled job, see Use Condition Check Definitions. The scheduled job performs the following actions:

- Changes the contract state to **Active** if the contract is approved and reaches the specified start date.
- Renews the contract if the contract is approved for renewal and reaches the specified start date.
- Changes the contract state to **Expired** if the contract state is **Active** and reaches the end date.

The system property *contract_compliance_check_job.enable_override* enables the Contract Compliance Checks job to override checks in a hierarchy. By default, this system property is set to **True**. When checks are defined on the same field of the parent and child tables, the Contract Compliance Checks job performs the following:

- For the records on the parent table, the condition check on the table sets the field with the value specified in the condition.
- For the records on the child table, the condition check on the child table overrides the parent table condition and sets the field value on the child table accordingly.

For example, when a check is defined on the Description field of the Contract (parent) and Lease (child) tables, the field on the Lease table is set to the value specified in the child table condition. To disable the contract compliance check override functionality, set the system property contract_compliance_check_job.enable_override to **False**.

Expense lines are only generated from contracts that are active or expired.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Contract states

State	Description
Draft	User adds information about the contract and specifies an approver.
Active	Contract was approved and has reached the specified start date.
Expired	Contract reached the specified end date. Expired contracts with an active renewal workflow that are waiting for approval have a substate of **Awaiting Review**. Expired contracts with an active renewal workflow where the renewal was approved, but the renewal date hasn't yet passed, have a substate of **Renewal Approved**. Expired contracts with no active renewal or extension pending workflow have an empty substate.
Canceled	Contract was discontinued and is no longer active.

In addition to a state, a contract can also have a substate.

Contract substates

Substate	Description
Awaiting Review	Contract is being prepared for review.
Under Review	Contract sent to the approver and the approver is reviewing the contract.
Approved	Contract reviewed and accepted by the approver.
Rejected	Contract reviewed and declined by the approver.
Renewal Approved	Contract renewal approved by the approver.
Renewal Rejected	Contract renewal rejected by the approver.
Renewal in process	Contract renewal is in progress through the contract renewal workflow.
Renewed	Contract renewal is complete through the contract renewal workflow.
Extension Approved	Contract extension approved by the approver.
Extension Rejected	Contract extension rejected by the approver.
None	No substate is specified.

Contracts

A contract is a binding agreement between two parties.

In the ServiceNow AI Platform, contracts contain detailed information such as contract number, start and end dates, active status, terms and conditions statements, documents, renewal information, and financial terms.

Working with contracts includes the following tasks and processes.

Create a contract

Create a contract with various contract models, which would act as a binding agreement between the two parties.

Before you begin
Role required:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- For Core UI and Hardware Asset Workspace: admin, contract_manager
- For Enterprise Asset Workspace: sn_eam.enterprise_admin, sn_eam.enterprise_asset_manager
- For Software Asset Workspace: sam_admin, sam_user

About this task

If a contract has one or more associated rate cards, the fields on the Contract form can't be edited.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you're using the Core UI, navigate to **All** > **Contract** and select a contract type, such as **Insurance**, **Maintenance**, or **Service**, or select **All**.
   - If you're using Hardware Asset Workspace, navigate to the **Contract management** view and then select the **All contracts** tab.
   - If you're using Enterprise Asset Workspace, open the **Contract and lease management** view and then select the **All contracts** tab.
   - If you're using Software Asset Workspace, navigate to **License operations** > **Contracts** > **Software contracts** and select **New**.
2. Select **New**.
3. On the form, fill in the fields.
   Not all fields appear on all contract type forms.

Contract or Create New Contract form

Field	Description
Contract model	Model the contract is assigned to. For example **Lease**, **Maintenance**, **Warranty**, **Service Contract Software License**, or **Subscription**.
Vendor	Vendor responsible for the contract. This field is required when **Purchase Agreement** or **NDA** is selected from **Contract model**.
Contract number	Number assigned to the contract by the vendor (required).
Name	Name of the contract.
Parent contract	Parent contract of the new contract, if applicable. You can select a parent contract from the contract lookup list.
Start date	Date on which the contract takes effect. This field is required when **Purchase Agreement** or **NDA** is selected from **Contract model**.
End date	Date on which the contract expires. Leave the end date empty to create an open-ended contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	This field is required when **Purchase Agreement** or **NDA** is selected from **Contract model**.
State	Current state of the contract. ○ Draft ○ Active ○ Expired ○ Canceled
Substate	Current substate of the contract. ○ Awaiting Review ○ Under Review ○ Approved ○ Rejected
Contract administrator	Person responsible for managing the contract and interacting with the vendor.
Approver	User who approves or rejects the contract. This list is filtered to only show users with the contract manager role.
Business owner	User who manages the contract from a business perspective.
Agreement type	Agreement type of license: ○ Enterprise ○ SaaS ○ Subscription This field appears only when **Maintenance** and **Software License** is selected from **Contract model**.
Commitment	Amount committed to spend with this vendor during this time period, from the start to the end of the contract. This field appears only when **Purchase Agreement** is selected from **Contract model**.
Discount	Discount the vendor has agreed to provide. This field appears only when **Purchase Agreement** is selected from **Contract model**.
Process non-contractual SLAs	Option to process both contractual and non-contractual Service Level Agreements (SLAs). This field appears only when **Service Contract** is selected from **Contract model**.
Description	Detailed description of the contract.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Financial section	
Invoice payment terms	Terms that explain how to pay the contract. For example, **Net Monthly Account** or **Net 30**.
Payment schedule	Schedule that defines when to make payments. For example, **Monthly** or **Annually**.
Payment amount	Amount that has been paid on the contract to date.
Applicable taxes	Indicates if the contract is exempt from taxes or subject to sales tax.
Effective tax rate	Effective tax rate to apply to the total cost, if applicable. Effective tax rate is usually the average tax rate charged. This field appears only when **Sales** is selected from **Applicable taxes**.
Tax cost	Total cost of the tax. This field appears only when **Sales** is selected from **Applicable taxes**.
Total cost	Final cost of the contract after adjustments have been applied. If a contract has one or more rate cards, this field shows the combined value of all rate cards. This field appears only when **Sales** is selected from **Applicable taxes**.
Vendor account	Vendor account associated with the contract.
PO Number	Purchase order number assigned to the contract.
Cost center	Cost center that is financially responsible for the asset.
Has rate card	Check box to indicate whether the contract has an associated rate card.
Renewal section	
Automatically renew	Indicates if the contract can be renewed or extended at the end of its term.
Options	Duration of the contract renewal or extension. For example, 1 year.
Renewal start date	Date on which the contract renewal or extension takes effect.
Renewal end date	Date on which the contract renewal or extension ends.
Cost adjustment type	Type of cost adjustment applied to the contract. ○ Fixed ○ Manual ○ CPI (Consumer Price Index)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Cost adjustment amount	Numerical increase or decrease in price of contract. To indicate a decrease in price, enter a negative number. Either a **Cost adjustment** or **Cost adjustment percentage** can be specified, but not both.
Cost adjustment percentage	Percentage increase or decrease in price of contract. To indicate a decrease in price, enter a negative percentage. Either a **Cost adjustment** or **Cost adjustment percentage** can be specified, but not both.
Terms and Conditions section	
Terms and conditions	Specific legal information in the contract.

4. Save the form.
   - If you're using Core UI, right-click the form header and select **Save**.
   - If you're using Hardware Asset Workspace, Software Asset Workspace, or Enterprise Asset Workspace, select **Save**.

   The **Initiate contract extraction** button is displayed on the contract form when you save the software contract record, provided the following conditions are met:
   - The Now Assist in Contract Management plugin (sn_cm_gen_ai) is installed.
   - Contract obligation extraction and Contract metadata extraction skill is activated.
5. Continue entering information in the related lists or tabs that appear.

Contract form related lists or tabs

Related list or tab	Description
Assets Covered	Lists all assets covered by this contract.
Users Covered	Lists all users covered by this contract.
Contract used by	Lists all configuration items (CI) used in this contract.
Terms and Conditions	Lists all terms and conditions of this contract.
Expense Lines	Lists all expense lines in this contract.
Contract History	Displays the changes to the start and end dates of this contract and changes to the terms and conditions.
Approval History	Lists all approvals for this contract.
Service Offerings	Lists all service offerings from this vendor. Activate Service Portfolio Management to see this related list.
Service Commitments for Contracts	Lists all service commitments for this vendor's offerings. Activate Service Portfolio Management to see this related list.

6. Perform one of the following actions.
   - Select **Update** to save and exit the contract.
   - Select **Submit for Review** to send a notification to the approver.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

- Models
- Service Portfolio Management
- Add a commitment to a service offering
- Contract renewal workflow
- Contracts
- Initiate metadata and obligation extraction from a signed contract in the Software Asset Workspace

Create a software maintenance contract example

One common use case for the Contract Management application is creating a contract to track maintenance payments for enterprise software. You can use this example to learn how to create a software maintenance contract.

Before you begin

Role required: contract_manager or admin

About this task

The goal of this example is to create a contract that shows the total amount of maintenance that must be paid for the software application, independent of different license purchases made over time. The Software Asset Management plugin must be activated to use this example.

Procedure

1. Create an application model, adding a **Name** and specifying **Software License** in **Model categories**.
2. Create a software model, adding a **Name** and **Model Number**, and selecting the application model created in step 1.
3. Create a new software entitlement by selecting the software model created in step 2.
4. Navigate to **Contract** > **Contracts** > **Maintenance**.
5. Click **New** and enter the following information.

Option	Description
Agreement Type	Select **Enterprise**.
Application Model	Select the application model created in step 1.

6. Right-click the form header and click **Save**.
   A number of related lists and sections appear.
7. In the **Asset Covered** related list, click **New** and enter the following information.

Option	Description
Asset	Select the software license created in step 3.
Date added	Enter the value.

8. Click **Submit**.
9. Continue completing the form with the following information.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
Payment schedule	Select **Annually**.
Payment amount	Enter the value.

10. Complete the other fields as appropriate.
11. Click **Update**.
12. Submit the contract for review.

Related topics

Software Asset Management

Add an asset to a contract

You can associate contracts with specific assets, including software licenses.

Before you begin
Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task
Linking a contract with assets clarifies what the contract legally covers.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract Management** > **Contract** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Add assets to the contract.
   - If you are using the core UI, use the following steps:
     a. In the **Assets Covered** related list, click **New**.
     b. In the **Asset** field, select a specific asset that is covered by the contract.
     c. In the **Date added** field, select the date the asset was added to the contract.

        The date can be in the past, the present, or the future.
     d. (Optional) In the **Date removed** field, select the date the asset was, or will be, removed from the contract.

        Specifying the **Date added** and **Date removed** fields is useful for reporting.
     e. Click **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If you are using the Hardware Asset Workspace or Enterprise Asset Workspace, use the following steps:

  a. In the **Assets Covered** tab, click **New**.

  b. In the dialog box, select the check box for each asset that you want to add to the contract.

  c. Click **Add**.

Add a user to a contract

A contract can cover specific users. For example, you may use a contract to hire a group of temporary workers.

Before you begin

Role required: contract_manager or admin

Procedure

1. Navigate to **Contract Management** > **Contract** > **All**.
2. Select a contract.
3. In the **Users Covered** related list, click **New**.
4. In the **User** field, select a specific user covered by the contract.
5. In the **Date added** field, select the date the user was added to the contract.
   The date can be in the past, the present, or the future.
6. **Optional:** In the **Date removed** field, select the date the user was, or will be, removed from the contract.
   Specifying the **Date added** and **Date removed** fields can be useful for reporting.
7. Click **Submit**.

Add a configuration item to a contract

Contracts can be associated with configuration items. You can link a contract with configuration items to clarify what the contract legally covers.

Before you begin

Role required: admin or contract_manager

Procedure

1. Navigate to **Contracts** > **All**.
2. Select a contract.
3. **Optional:** In the **CIs Covered** related list, select **New** to create a configuration item.
4. In the **CIs Covered** related list, select **Edit**.
5. In the **Collection** configuration items list on the left, double-click a configuration item name.
   The item is added to the **CIs Covered List** on the right.
6. Select **Save**.

Add a document to a contract

Contracts can be associated with documents. Linking a contract to related documents helps keep all relevant information about a contract together and easily accessible.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **All** > **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Add a document to the contract.
   - If you are using the core UI, use the following steps:
     a. Click the Manage Attachments icon on the form header.
     b. In the Attachments dialog box, click **Choose file** to search for and select the document that you want to add to the contract.
   - If you are using the Hardware Asset Workspace or Enterprise Asset Workspace, use the following steps:
     a. Click the Attachment ( ) icon on the sidebar of the contract record.
     b. In the Attachments window, click **Select** to search for and select the document that you want to add to the contract.

Adjust a contract

After creating a contract, you can change the start date, end date, or payment amount for a contract.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task

To adjust a contract, the **State** should be **Active**. If the end date of a contract changes, the end date of any associated assets changes to match the new end date.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract in the **Active** state.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Click **Adjust**.
4. In the Adjust the Contract dialog box, fill in the fields.

Adjust the contract fields

Field	Description
Contract Start Date	Date on which the contract takes effect.
Contract End Date	Date on which the contract expires.
Contract Payment Amount	Total amount paid for the contract. If the contract has one or more rate cards, this field shows the total of all rate card base costs.

5. Click **Submit Adjustments**.

Renew a contract

After you have created a contract or the contract has expired, you can renew the contract.

Before you begin

Role required: admin, contract_manager (core UI or Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task

- When a contract is renewed, a new contract isn't created. Instead, the same contract is updated with renewal information.
- The changes to the start date and end date of a contract is captured in the Contract History tab.
- Contract information and history is retained when a contract is renewed. If the end date of the contract changes, the end date of any associated assets changes to match. You can renew a contract that meets the following conditions.
  - **State** is **Active** or **Expired**
  - **Substate** is **None** or **Rejected**
- If the system property *sn_contract_enable_renewal_flow* is enabled, the contract renewal workflow is available for maintenance & warranty contracts. For more information, see Contract renewal workflow.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.

     Alternatively, select the **Overview** tab of the Contract management view. In the Contract overview section, locate the Expiring contract widget to view the list of contracts that are expiring.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.

  Alternatively, select the **Overview** tab of the Contract and lease management view. In the Contract overview section, locate the Expiring contract widget to view the list of contracts that are expiring.

2. Select a contract in the **Active** or **Expired** state.
3. Click **Renew**.
4. On the Renew the Contract form (core UI) or dialog box (Hardware Asset Workspace and Enterprise Asset Workspace), fill in the fields.

Renew the Contract fields

Field	Descriptions
Approver	User who approves or rejects the contract.
Options	Length of time for the renewal, in years.
Renewal start date	Date on which the renewed contract takes effect.
Renewal end date	Date on which the renewed contract expires.
Cost adjustment type	Type of cost adjustment applied to the renewed contract: **None**, **Fixed**, **Manual**, or **CPI**.
Cost adjustment percentage	Percentage increase or decrease in price of the renewed contract. To indicate a decrease in price, enter a negative percentage. A **Cost adjustment amount** or **Cost adjustment percentage** can be specified, but not both.
Cost adjustment amount	Numerical increase or decrease in price of the renewed contract. To indicate a decrease in price, enter a negative number. A **Cost adjustment amount** or **Cost adjustment percentage** can be specified, but not both.

5. Perform one of the following steps.
   - To save all entered data and change the substate to **Under Review**, click **Submit for Review**. The contract is sent to the specified **Approver**.
   - To save all entered data and change the substate to **Awaiting Review**, click **Save**. The **Renew** button is available to submit the renewed contract for review later.
6. Change any information on the **Contract** form, as necessary.
7. Click **Update**.

What to do next

If you selected the **Save** option, ensure that you click **Renew** when you are ready to submit the contract renewal for approval.

Cancel a contract

You can cancel a contract when the **State** is **Active**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task

After a contract is canceled, the following process occurs.

- The contract **State** changes to **Canceled**.
- Condition checkers are changed to inactive.
- **Renew** and **Extend** buttons become inactive.
- Contract rate cards become inactive.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Click **Cancel Contract**.
4. Click **Yes** to confirm the contract cancellation.

Verify contract administrator assignment for notification

An event runs automatically each night to send reminders to contract administrators about contract expiration dates so they can renew or renegotiate the contract. You can verify that the right contract administrator is assigned to the contract.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task

When the contract.expiration event runs on the Contract [ast.contract] table each night, an email message is sent to the person identified as the contract administrator. This email is sent at the following times.

- 90 days ahead of the contract expiration date
- 60 days ahead of the contract expiration date
- 30 days ahead of the contract expiration date
- On the contract expiration date

A user with the admin role can edit the contract.expiration condition check that processes contract notifications.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Check that the **Contract administrator** field contains the correct name.
   A single name can be specified.

Related topics

Condition check definitions

Email and SMS notifications

Send the contract for approval

You can send a contract that is in **Draft** state for approval.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract in the **Draft** state and **Awaiting Review** substate.
3. Select an **Approver** for the contract.
4. Click **Submit For Review**.
   An email message is sent to the selected approver and the contract **Substate** changes to **Under Review**.

Related topics

Contract approval flow

Approve or reject a contract

If you are the contract manager, you can approve or reject a contract.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Open the list of contract and contract renewal requests.
   - If you are using the core UI, navigate to **All** > **Contract** > **My Approvals**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **My approvals** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **My contract approvals** tab.
2. Select a contract in the **Requested** state.
3. Approve or reject the contract.
   - Approve the contract.
     - To approve the contract in the core UI, click **Approve**. The contract **Substate** changes to **Approved**.
     - To approve the contract in the Hardware Asset Workspace or Enterprise Asset Workspace, set the **State** field to **Approved**.
   - Reject the contract.
     - To reject the contract in the core UI, click **Reject** and enter a rejection reason in the **Comments** field. The contract **Substate** changes to **Rejected**.
     - To reject the contract in the Hardware Asset Workspace or Enterprise Asset Workspace, set the **State** field to **Rejected**.
4. Click **Update** (core UI) or **Save** (Hardware Asset Workspace and Enterprise Asset Workspace).
   - A contract with the state set to **Draft** and a start date set in the future is kept in **Draft** until the start date is reached. If the contract has a **Substate** of **Approved**, the system changes the **State** to **Active** and removes the **Substate** value.
   - When a contract with a **State** of **Draft** and a **Start Date** set to a date in the past is approved, the contract **State** is automatically set to **Active** and **Substate** is left blank.

Related topics

Contract approval flow

View approval history on contracts

You can view the approval history for a contract in the Approval History related list on the Contract form.

Before you begin

Role required: workflow_admin, admin, or sn_eam.enterprise_admin (Enterprise Asset Workspace only)

About this task

After a contract is sent to an approver for review, the approver name cannot be changed. If the approver rejects a contract, the same approver or a different approver can be specified before the contract is sent for approval again. Once the contract has been reviewed and approved, approval history records are automatically listed in the Approval History related list on the Contract form.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Select the **Approval History** tab.
4. Click a record to view the approval details.

Related topics

Contract approval flow

Terms and conditions

You can add terms and conditions to a contract to keep all documentation that is relevant to a contract in one location.

The terms and conditions can be searched and used in reports. If multiple terms and conditions records are added to a single contract, set an order for the records so they appear in a specific sequence. The terms and conditions fields become read-only after a contract is sent for approval.

Users with the contract_manager role can read contract history and add terms and conditions.

There are three procedures involved in adding terms and conditions to a contract:

Create a terms and conditions record

You can create a terms and conditions record to add to a contract.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

Procedure

1. Open the list of terms and conditions for your contracts.
   - If you are using the core UI, navigate to **All** > **Contract** > **Contracts** > **Terms & Conditions**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **Terms and conditions** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **Terms and conditions** tab.
2. Click **New**.
3. On the Terms and Conditions form (core UI) or Create New Terms and Conditions form (Hardware Asset Workspace and Enterprise Asset Workspace), fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Terms and Conditions or Create New Terms and Conditions form

Field	Description
Number	Unique ID used for the terms and conditions. This field is automatically generated.
Name	Name for the terms and conditions.
Contract	Link to the contract.
Used	Check box to indicate if the terms and conditions are associated with contract.
Description	Details of the terms and conditions.

4. Click **Submit** (core UI) or **Save** (Hardware Asset Workspace and Enterprise Asset Workspace).

Add terms and conditions to a contract

After you create a terms and conditions record, add the record to a contract that is in the Awaiting Review, Rejected, Renewal Rejected, or Extension Rejected substate.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task

You can add terms and conditions to a contract only when the contract state is **Draft** and the substate is **Awaiting Review**. After the contract is approved, the substate changes to **Approved** and terms and conditions can't be added or changed at any subsequent stage. However, you can add terms and conditions to cancelled contracts.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Add terms and conditions to the contract.
   - If you are using the core UI, use the following steps:
     a. In the **Terms and Conditions** related list, double-click **Insert a new row**.
     b. Click the reference lookup icon and select a terms and conditions record from the list.
     c. (Optional) Enter a number in **Order** to specify the sequence in which the record should appear in the terms and condition document.

     Note: If you attempt to enter a duplicate terms and conditions record for a contract and save the record, an error message appears and the new duplicate record is not added.

   - If you are using the Hardware Asset Workspace, use the following steps:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. On the **Terms and Conditions** tab, click **Add**.

b. When prompted, provide the required information.

- If you are using the Enterprise Asset Workspace, use the following steps:

a. On the **Terms and Conditions** tab, click **Add**.

b. In the dialog box, select the check box for each term and condition that you want to add.

c. Click **Add**.

Build a terms and conditions document within a contract

After adding one or more terms and conditions records to a contract, you can build a terms and conditions document within the contract.

Before you begin

Role required: admin, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

About this task

The terms and conditions records are added in the sequence specified in the **Order** field.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract Management** > **Contract** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Verify that one or more terms and conditions records have been added to the **Terms and Conditions** tab.
4. On the **Terms and Conditions** tab, build the terms and conditions for the contract.
   - If you are using the core UI, click the **Build Terms and Conditions** related link.
   - If you are using the Hardware Asset Workspace or Enterprise Asset Workspace, click **Build Terms and Conditions**.

   All records from the Terms and Conditions list are added to the Terms and Conditions for the contract.
5. Click **Update**.

Create a contract rate card

You can create rate cards to track contract expenses. Rate cards help to record and allocate costs.

Before you begin

You must activate the Cost Management plugin to use rate cards.
Role required: financial_mgmt_user, asset, or contract_manager

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

A contract rate card provides detailed price information for a contract and enables you to generate expense lines for recurring expenses automatically. There can be multiple rate cards for the same contract.

Consider the following case: an organization has a contract with a third-party company, which oversees technical operations in the organization's data centers. The contract costs to use a specific server model in the New York data center are different from using the same server model in the Madrid data center. There are two rate cards to detail these costs separately.

Procedure

1. Navigate to **Contract Management** > **Contract** > **All**.
2. Select a contract.
3. In the **Contract Rate Cards** related list, click **New**.
4. On the Contract Rate Card form, fill in the fields.
   For a description of the field values, see Contract Rate Card form.
5. Click **Submit**.

Related topics

Allocating expenses

Use business services with expenses

Contract Rate Card form

The Contract rate card form enables you to generate expense lines for recurring expenses automatically by providing detailed price information for a contract. There can be multiple rate cards for the same contract.

Field	Description
Number	Contract rate card number.
Contract	Internal contract number.
Summary type	Contract rate card type. Categorizing rate cards can be useful for reporting. Select **Grow Business**, **Run Business**, or **Transform Business**.
Name	Descriptive name for the contract rate card.
Active	Option that indicates whether the rate card is available for use.
Short description	Brief description of the contract rate card.
Start date	Date on which the contract rate card becomes active. Expense lines are generated for the costs incurred beginning on the date specified. For financial calculations to work, the date cannot be before the start date of the contract.
End date	Date on which the contract rate card becomes inactive. For financial calculations to work, the date cannot be after the end date of the contract. If no value is entered, the date is automatically set to the end date of the contract if the contract has an end date. No expense lines are generated for costs incurred after the end date.
Interval	The amount of time between rate card charges. For example, **Monthly**, **Quarterly**, or **Annually**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Cost center	The cost center financially responsible for the rate card.
Last processed	The most recent date on which the rate card was charged.
Next process	The next date on which the rate card will be charged.
Description	Detailed information about the rate card.
Sales tax	Option that indicates whether to apply sales tax to the total cost.
Tax rate	The effective tax rate to apply to the total cost. This tax rate is usually the average tax rate charged.
Distribute cost	The method for distributing the amount listed in the **Base cost** field and generating expense lines.
Value	Type of value to use when **Allocate and distribute cost based on value** is selected in the **Distribute cost** field.
Base cost	The amount that must be paid before taxes.
Tax cost	Total cost of the tax.
Total cost	Final cost of the rate card after adjustments such as taxes have been applied.

Create a new expense line

Typically, expense lines are automatically generated based on assets or users, but you can create a new expense line manually if needed.

Before you begin

Role required: asset, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract Management** > **Contract** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. In the **Expense Lines** related list (core UI) or tab (Hardware Asset Workspace and Enterprise Asset Workspace), click **New**.
4. Complete the form.

Expense line table

Field	Description
Number	The unique number identifying the expense line.
Date	The date on which the expense line was created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Rate Card	The identification number of the rate card to which the expense line is associated.
Rate type	The rate type that is considered during the expense line generation. This field is read-only.
Source ID	The identification number of the item associated with the expense line. If this field is filled in, corresponding information is automatically added to the **Source** fields on this form.
Amount	The monetary value of the item specified in the **Source ID** field. Enter a negative value to indicate a credit.
Process date	The date the expense line is processed.
Inherited	Check box that indicates whether the expense line is on another expense line.
State	The current state of the expense line, either **Pending** or **Processed**.
Summary type	The expense line category: **Grow Business**, **Run Business**, or **Transform Business**. Categorizing expense lines can be useful for reporting.
Short description	A brief description of the expense line.
Asset	The identification number of the asset associated with the expense line, if any.
Fixed asset	Fixed asset that contains the asset in this expense line. A fixed asset is a container that holds one or more individual assets, including hardware or software assets. The system auto-populates this field with the appropriate fixed asset if the named **Asset** is contained within that fixed asset.
Contract	The identification number (not the contract number) of the contract associated with the **Asset**, if any.
User	The name of the user associated with the **Asset**, if any.
Configuration Item	The name of the configuration item associated with the expense line, if any.
Task	The identification number of the task associated with the expense line, if any.
Cost center	The cost center financially responsible for the item identified in **Source ID**, if any.

5. Click **Submit** (core UI) or **Save** (Hardware Asset Workspace and Enterprise Asset Workspace).

Generating expense lines based on assets or users

An expense line is an expense amount at a given point in time and the record that incurred or generated the expense. You can generate expense lines based on assets or users assigned to the contract.

Before you begin

Role required: financial_mgmt_user, asset, or contract_manager

About this task

Generating expense lines is a three-step procedure.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

Add a user or asset to a contract

You can add a user or asset to a contract to generate expense lines.

Before you begin

Role required: asset, financial_mgmt_user (core UI and Hardware Asset Workspace only), contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract Management** > **Contract** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Add assets or users to the contract.
   - If you are using the core UI, use the following steps:
     a. In the **Assets Covered** or **Users Covered** related list, click **New**.
     b. Specify an **Asset** or **User**.
     c. Specify a **Date Added**.
     d. Click **Submit**.
     e. (Optional) Repeat the previous steps to add more assets or users to the contract.
   - If you are using the Hardware Asset Workspace or Enterprise Asset Workspace, use the following steps:

     Note: You cannot add users to a contract in the Enterprise Asset Workspace.

     a. In the **Assets Covered** or **Users Covered** tab, click **New**.
     b. In the dialog box, select the check box for each asset or user that you want to add to the contract.
     c. Click **Add**.

Create a rate card and assign a user or asset

You can assign a user or asset when you create a rate card. You can only assign the user or asset that is assigned to the contract.

Before you begin

Role required: financial_mgmt_user, asset, or contract_manager

Procedure

1. Navigate to **Contract Management** > **Contract** > **All**.
2. Select a contract with an assigned user or asset.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. In the **Contract Rate Cards** related list, click **New**.
4. Specify a **Start date**.
   For financial calculations to work, the date cannot be before the start date of the contract.
5. Right-click the header bar and select **Save**.
6. In the **Asset Covered** or **Rate Card Users** related list, click **New**.
7. Select the **Asset** or **User** who is assigned to the contract.
   Only assets and users associated with the parent contract are listed.
8. Specify a **Date Added**.
9. Click **Submit**.

Configure rate card expense generation

After assets or users are added to the rate card, you can use the **Distribute cost** field in the Financial section of the contract to generate rate card expenses.

Before you begin

Role required: financial_mgmt_user, asset, or contract_manager

Procedure

1. Navigate to **Contract** > **Contracts** > **All**.
2. Select the contract to generate expenses.
3. In the **Contract Rate Card** related list, select a rate card.
4. In **Distribute cost**, select one of the following options to distribute the amount listed in **Base cost**.

Option	Description
Split expense lines evenly across assets	Select **Allocate and distribute cost per asset**. For example, with a $100 **Base cost** and two assets, two expense lines for $50 are creat ed.
Split expense lines across assets based on asset value	Select **Allocate and distribute cost based on value:**. The **Value** field displays with **Cost** and **Resid ual Cost** options. The cost is derived from the **Cost** or **Residual Cost** field on an asset record. If there are multiple assets on the rate card, the cost or residual cost is distributed based on the value of the assets. For example, if you select the **Cost** option with a $100.00 **Base cost**, one asset worth $70, and one asset worth $30, two expense lines are created, one for $70 and one for $30.
Split expense lines evenly across users	Select **Allocate and distribute cost per user**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
	For example, with a $100 **Base cost** and two users on the contract, two expense lines for $50 are created.
Allocate the cost to the contract instead of the individual assets	Select **Allocate cost to contract**.

5. Select **Update**.
   Expense lines are automatically generated by a scheduled job for costs incurred between the rate card **Start date** and **End date**. The scheduled job, *Process FM Costs*, runs on the Contract [ast_contract] table once per day. This scheduled job runs forward and generates additional records from the Next Process [next_process] time. Expense lines are only generated from contracts with the **Active** or **Expired** state. You may want to generate expense lines for expired contracts to track previous expenses.

Related topics

Contract life cycle

View contract expense lines

Use the **Expense Lines** related list or tab to view and audit all the expenses recorded for a given contract.

Before you begin

Role required: asset, financial_mgmt_user (core UI and Hardware Asset Workspace only), contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. Select the **Expense Lines** related list (core UI) or tab (Hardware Asset Workspace and Enterprise Asset Workspace).
4. Select an expense line record to view.
   Information such as expense line details, total cost of the contract, and the contract current value is listed.

Monitor a contract

You can monitor contracts by viewing contract history and creating contract reports.

Before you begin

Role required: asset, contract_manager (core UI and Hardware Asset Workspace only), sn_eam.enterprise_admin (Enterprise Asset Workspace only), or sn_eam.enterprise_asset_manager (Enterprise Asset Workspace only)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Contracts with the Contract model set to **Subscription** are readable by all authenticated users regardless of their assigned roles. This allows users to view their own subscription-based assets in the **My Assets** report. For all other contract types, the role requirements in the prerequisites section apply.

About this task

If changes are made to a contract start date, end date, or terms and conditions, a copy of the contract is automatically saved and placed in contract history. This is useful for tracking changes to a contract and keeping an audit trail. Configure the **Contract History** related list or tab to include columns for creation and update so you can easily see who edited the contract.

Procedure

1. Open the list of contracts that are used across your deployment.
   - If you are using the core UI, navigate to **Contract** > **Contracts** > **All**.
   - If you are using the Hardware Asset Workspace, open the Contract management view and then select the **All contracts** tab.
   - If you are using the Enterprise Asset Workspace, open the Contract and lease management view and then select the **All contracts** tab.
2. Select a contract.
3. View the **Contract History** related list (core UI) or tab (Hardware Asset Workspace and Enterprise Asset Workspace) and perform one of the following actions.
   - If earlier versions of the contract exist, select a date in the **Contract Starts** column to view a version.
   - If an earlier version of the contract does not exist, change the contract's **Start date** or **End date**. Right-select in the header bar and select **Save**. In the **Contract History** related list, select a date in the **Contract Starts** column to view the earlier version.

Run a contract report

A variety of contract reports are available to help track and manage contracts.

Before you begin

Role required: contract_manager or admin

Procedure

1. Navigate to **All** > **Reports** > **View / Run**.
2. Select one of the following reports to run.

Contract reports

Report	Description
Active Contracts by Cost Per Unit	All active contracts grouped in ascending order by average cost per unit.
Active Contracts by Lifetime Cost	All active contracts with an associated rate card grouped in ascending order by total cost. Total cost is measured from the beginning of the contract to the report run date.
Active Contracts by Monthly Cost	All active contracts grouped in ascending order by cost per month.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Report	Description
Active Contracts by Vendor	All active contracts alphabetically by vendor.
Active Contracts by Yearly Cost	All active contracts grouped in ascending order by cost per year.
All Contracts by State	Contracts grouped by state, such as **Draft**, **Active**, or **Expired**, in bar chart format
Asset Contracts by Type	All active contracts for assets grouped by type, in pie chart format.
Asset Contracts List	All active contracts for assets by contract number.
Contract Expenditure by Type	Total contract expenses by type, such as lease, maintenance, or warranty, in bar chart format.
Contract Expenditure by Vendor	Total costs of all contracts associated with a specific vendor, in bar chart format.
Contract Pipeline Report	All contracts with a state of **Draft**, **Active**, or **Expired** and a substate of **Awaiting Review** or **Under Review**, in bar chart format.
Expiring Contracts	All contracts expiring in the next 90 days.

Condition check definitions

Condition check definitions enable you to define logical conditions that indicate when to change a field value in a record.

A scheduled job, called *`Contract Compliance Checks`* in **System Scheduler** > **Scheduled Jobs**, evaluates these condition check definitions daily by running the condition checker. When this job is run, the ConditionChecks Script Include is triggered that runs the Condition Check Definitions. Use this condition checker to check start dates and end dates and to set expiration levels for contracts.

For example, a contract has a start date of March 1. When the condition checker runs on March 1, it verifies that the contract **Substate** is **Approved** and sets the contract **State** to **Active** based on the **Start Date** field.

The daily condition checker sets the appropriate expiration level for active contracts based on the contract **End Date**. The expiration level can be viewed in the Contracts list. Knowing the expiration level can help contract managers renew or extend a contract before it expires.

Define a condition check

You can define a condition check to change values in a contract when the *`Contract Compliance Checks`* scheduled job runs each night.

Before you begin
Role required:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- admin/contract_manager/contract_system_admin: Read access
- admin: Write access

Procedure

1. Navigate to **All** > **Contract** > **Administration** > **Condition Check Definitions**.
2. Click **New**.
3. Complete the form.

Condition check definition fields

Field	Description
Table	The table to which the condition applies. For a contract check definition, select **Contract [ast.contract]**.
Category	The category for the condition check. Select **Contract** or **None**. The category is used for organizing information and reporting.
Condition field	The field to be updated, typically **Expiration level** or **State**.
Event name	The name for the event to be fired when this condition changes the value of the field. Create a name using this syntax: <table_name>.<condition_field>, for example, `contract.validation`.
Order	The order in which the conditions are evaluated.

4. Right-click the header bar and click **Save**.
   The **Conditions** related list appears.
5. In the **Conditions** related list, click **New**.
6. Complete the form.

Conditions fields

Field	Description
Name	The value the field is set to, if the expiration conditions are met.
Condition check	The associated condition check.
Table	The table associated with the condition check.
Event name	The name of the event this condition triggers.
Expiration Condition	The condition that must be true for the **Condition check** field to be set to this value (the **Name**). Add as many conditions as are needed.
Compliant state	System field. Do not use.
Order	The order in which the conditions are evaluated. The first condition that is found to match, where the Expiration Condition is true, is used, and no others are checked.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. Click **Submit.**
   The Condition Checks form reopens with the new condition listed in the related list.
8. **Optional:** Continue adding conditions as needed, following the steps above.

Domain separation and Contract Management

Domain separation is unsupported in Contract Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: No support

Data-level separation

The Contract [ast_contract] table includes a **Domain** field (sys_domain). Domain separates contract records. Users in one domain can't view contracts created in a different domain.

Business logic

Scheduled jobs, renewal processing, approval flows, and other automated processes in Contract Management do not respect domain separation. Domain separation for these automated processes is not supported.

⚠ **Warning:** Contract data is separated by domain, but automated contract processes might not respect domain boundaries. Test all automated workflows in your domain-separated environment before deploying to production.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Procurement

Procurement managers can use the ServiceNow® Procurement application to create purchase orders and to obtain items for fulfilling service catalog requests.

Procurement offers the ability to perform the following functions.

- Track service catalog requests
- Create and manage purchase orders
- Create and manage transfer orders
- Receive assets

Procurement roles

The Procurement application uses the following roles.

Role	Contains roles	Description
procurement_admin	procurement_user	Can create purchase orders without a request. Can view requests and requested items. Can view transfer orders. Can create a purchase order or transfer order when sourcing items for a request. Can view the vendor catalog.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

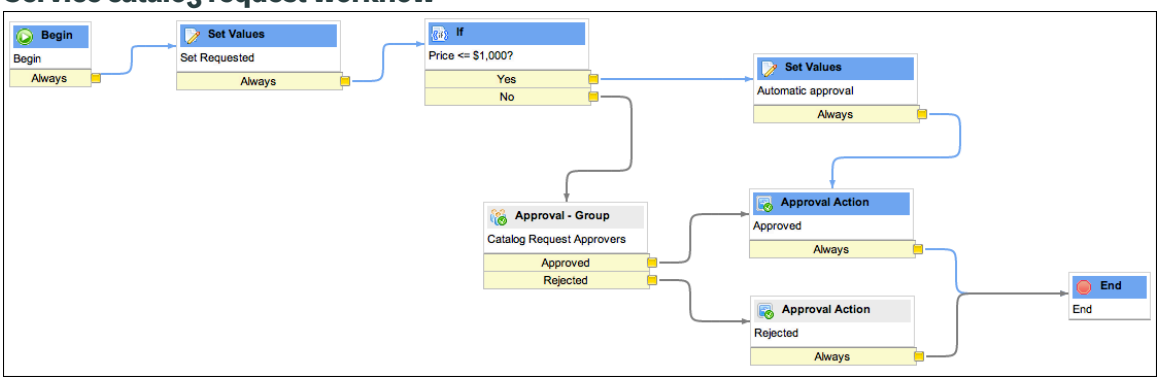
Role	Contains roles	Description
		Can refresh, add, delete, and rearrange gauges in the Procurement Overview module.
procurement_user	financial_mgmt_user, model_manager	Can create purchase orders without a request. Can view requests and requested items. Can view transfer orders. Can create a purchase order or transfer order when sourcing items for a request. Can view the vendor catalog. Can view and refresh gauges in the Procurement Overview module.

Procurement workflows

Procurement uses the following workflows. You can edit the existing flows or create a flow in the graphical Workflow Studio to meet your organization's asset procurement process.

- In the Service Catalog Request workflow, items ordered from the service catalog that cost over one thousand dollars require approval.

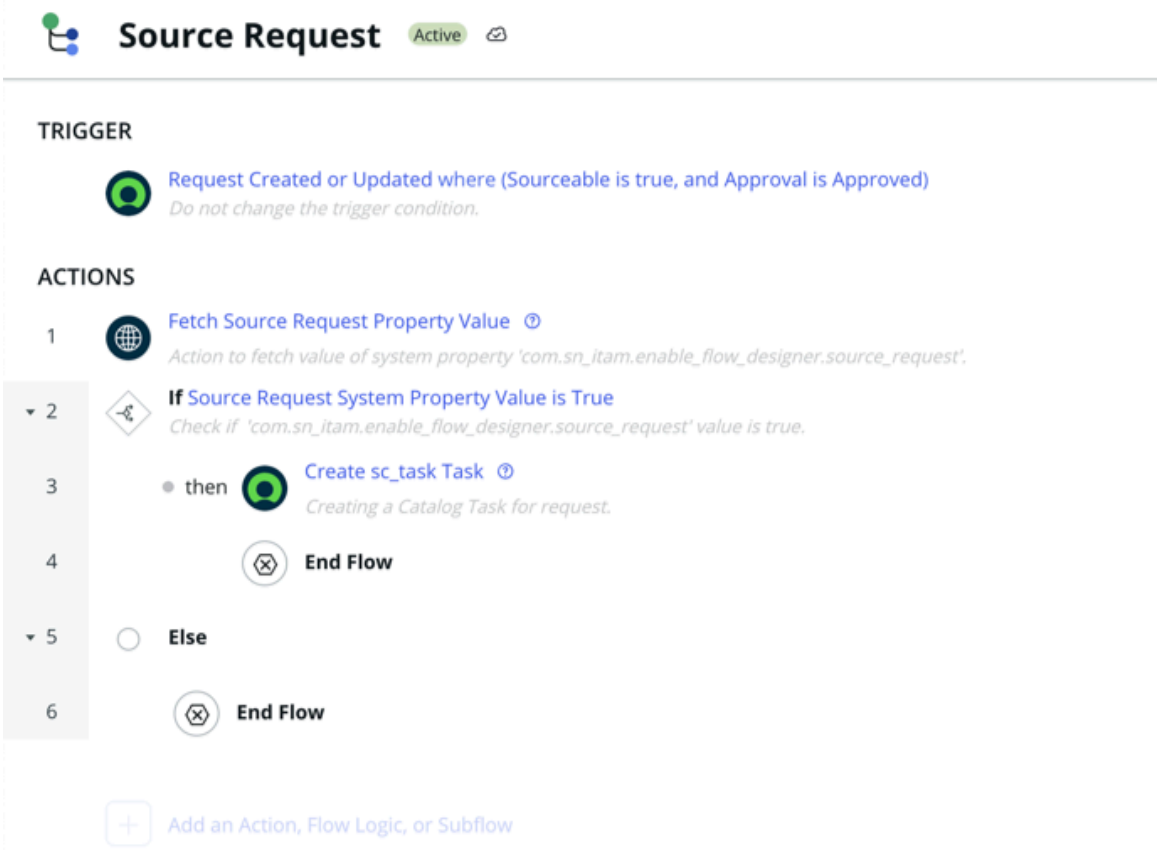
Service catalog request workflow



- In the Source Request workflow, catalog tasks are created so that a procurement manager can source the item by creating a transfer order or purchase order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

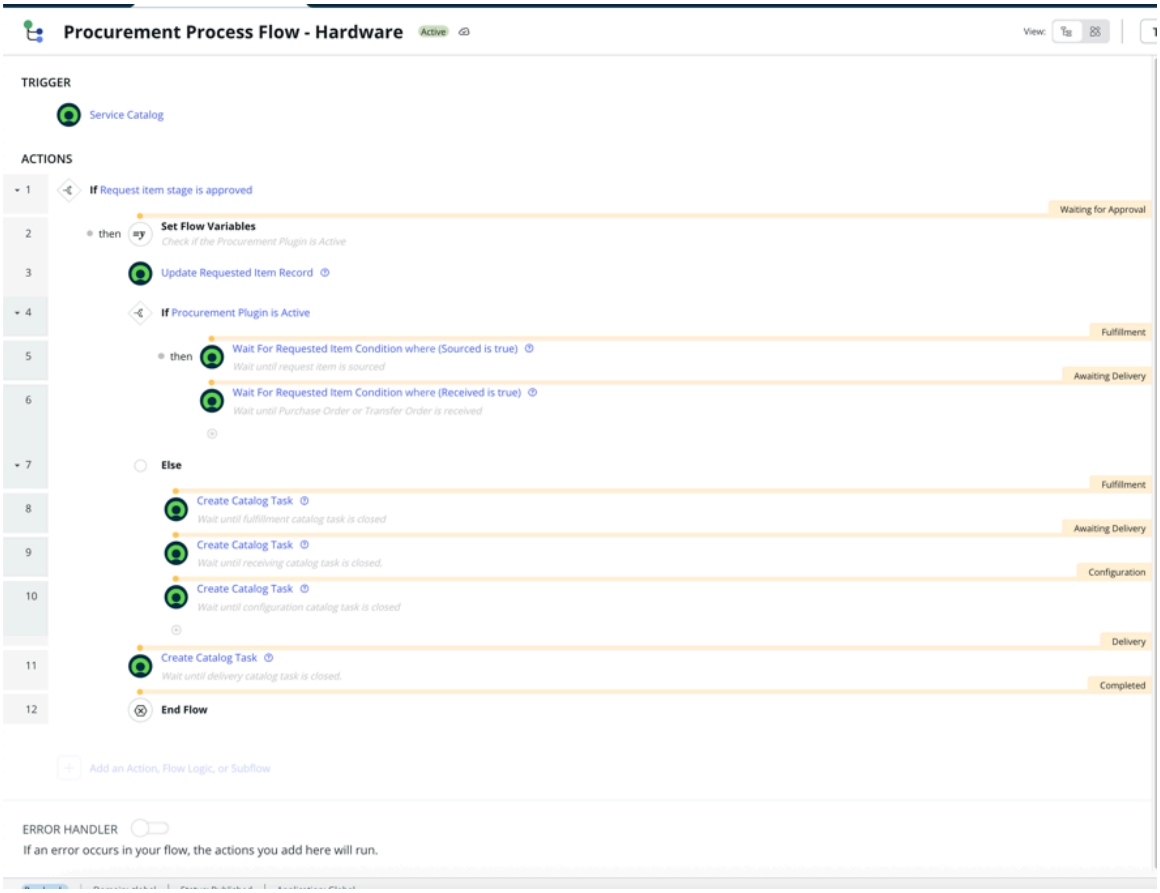
Source request



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- In the Procurement Process Flow-Hardware, a Service Catalog request task for a hardware asset is created so that a procurement manager can source the item by creating a transfer order or purchase order.

Procurement Process Flow-Hardware



Related topics

Workflows

Sourcing items in a service catalog request

Procurement purchase order management for assets

Use the Procurement Overview module

Use the gauges on the Procurement Overview homepage to help you track and manage requests, purchase orders, and other important aspects of the procurement process.

Before you begin

Role required: procurement_admin or procurement_user

Procedure

1. Navigate to **All** > **Procurement** > **Overview**.
2. Click elements within the gauges to obtain more information.

Example

For example, click a request number to view the request record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Activate Procurement

You can activate the Procurement plugin that provides core procurement capabilities.

Before you begin

Role required: procurement_admin, procurement_user

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Procurement plugin (com.snc.procurement) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. 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.

Components installed with Procurement

Several types of components are installed with Procurement.

Demo data is available with Procurement. The demo data provides sample requests, purchase orders, purchase order line items, and receiving slips.

Business rules installed with Procurement

Procurement plugin adds the following business rules.

Business rule	Table	Description
Adjust remaining quantity	Purchase order line items [proc_po_item]	Calculates the remaining quantity of items ordered on a purchase order line items by subtracting the amount received from the amount ordered.
Can request be sourced	Request [sc_request]	Checks if a request can be sourced.
Cancel Procurement Orders	Request [sc_request]	Cancels all unreceived purchase orders and unshipped transfer order lines associated with the request's items if the request state changes to **Closed Cancelled**.
Check if req item is sourced	Requested Item [sc_req_item]	Sets the **Sourced** field on the parent request to **true** if all requested items have been sourced.
Check if request is sourceable	Requested Item [sc_req_item]	Checks if the request associated with a requested item can be sourced (obtained from a transfer order or by creating a purchase order to a vendor).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Business rule	Table	Description
Create Assets	Receiving Slip Line [proc_rec_slip_item]	If the purchase order line item is available, creates the assets for a receiving slip line when the slip line assets are received.
Handle roll up states and assets removal	Purchase order line items [proc_po_item]	Manages purchase order line items if they are canceled or received. If a purchase order line is canceled, this business rule deletes any pre-created assets. This business rule also checks the status of other purchase order lines that share the same purchase order and, if necessary, updates the status of the purchase order. For example, when the last purchase order line is received, the status of the purchase order changes to **Received**.
Redirect TOL to existing TO-Procurement	Transfer Order Line [alm_transfer_order_line]	Attaches a transfer order line to an existing transfer order if the transfer order is in the **Draft** stage and has the same **From stockroom** and **To stockroom** values as the transfer order line.
Shipping Cost Changes	Purchase Order [proc_po]	Recalculates the total cost of the purchase order if the shipping rate changes.
State Change	Transfer Order Line [alm_transfer_order_line]	Marks the requested item as **Received** if the state of the associated transfer order line changes to **Received**.
State Change	Purchase order line items [proc_po_item]	Sets the time at which the purchase order line item is ordered and updates the original requested item when the purchase order line item is received.
State Change PO	Purchase Order [proc_po]	Changes the purchase order line item status when the status of the associated purchase order changes.
Total Cost	Purchase order line items [proc_po_item]	Calculates the total order cost based on the cost of individual items and the quantity ordered. When you receive a purchase order line item, this business rule also takes the following steps. • Populates the **List price** field with the value from the **Cost** field unless you enter a different value. • Calculates the **Total list price** field value by multiplying the **List price** and **Ordered quantity** values.
Update expected delivery date for PO	Purchase order line items [proc_po_item]	Sets the **Expected delivery date** for purchase orders to the latest purchase order line **Expected delivery date**.
Update expected	Purchase Order	Sets the **Expected delivery date** of associated purchase order lines to the purchase order's

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Business rule	Table	Description
delivery date for POLs	[proc_po]	**Expected delivery date** if at least one of the following conditions is true. • The purchase order line has no expected delivery date. • The purchase order line's expected delivery date is later than the purchase order's expected delivery date. • The purchase order line's expected delivery date is the same as the purchase order's previous delivery date.
Update Ordered Date	Purchase Order [proc_po]	Sets the **Ordered date** field to the date and time at which the status of the purchase order is set to **Ordered**.
Update PO	Purchase order line items [proc_po_item]	Updates the purchase order if the cost of any purchase order line item changes.
Update Purchase Order Line	Receiving Slip Line [proc_rec_slip_item]	Updates the **Quantity received** field on the associated purchase order line item when a receiving slip item is received.
Update Request Item CI	Hardware [alm_hardware]	Sets the **Configuration item** field on the catalog task and requested item to the related hardware CI created during the procurement process.

Related topics

Business rules

Client scripts installed with Procurement

Procurement plugin adds the following client scripts.

Client script	Table	Description
Hide request item if request is not empty	Catalog Task [sc_task]	Displays the task's **Request item** and the request item's **Requested for** value if the task is associated with a requested item and not directly with a request. Otherwise, if the task is associated with a request, the client script displays the **Request** and the request's **Requested for** value.
Purchase Order Line Mandatory	Receiving Slip Line [proc_rec_slip_item]	Changes the **Purchase Order Line** field on the Receiving Slip Line form to mandatory if the associated receiving slip has a listed purchase order.

Script includes installed with Procurement

Procurement plugin adds the following script include.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Script include	Description
ProcurementUtils	Provides utilities for Procurement.

Tables installed with Procurement

Procurement plugin adds the following tables.

Table	Description
Purchase Order [proc_po]	Stores information about items ordered, cost of items ordered, and users that require the items for orders placed with a vendor. **Note:** The asset, procurement_user, inventory_admin, or contract_manager role can only access the reports. You must activate the Hardware Asset Management Professional (com.sn_hamp) plugin for the contract_manager and inventory_admin role.
Purchase order line items [proc_po_item]	Stores information about items and quantity ordered on purchases orders. **Note:** The asset, procurement_user, inventory_admin, or contract_manager role can only access the reports. You must activate the Hardware Asset Management Professional (com.sn_hamp) plugin for the contract_manager and inventory_admin roles.
Receiving Slip [proc_rec_slip]	Stores receiving information for items ordered with a purchase order. Can reference multiple receiving slip lines.
Receiving Slip Line [proc_rec_slip_item]	Stores receiving information for items ordered on a specific purchase order line, such as the items ordered, quantity ordered, and who ordered them.

User roles installed with Procurement

Procurement plugin adds the following user roles.

Role	Contains roles	Description
procurement_admin	procurement_user	Can create purchase orders without a request. Can view requests and requested items. Can view transfer orders. Can create a purchase order or transfer order when sourcing items for a request. Can view the vendor catalog. Can refresh, add, delete, and rearrange gauges in the Procurement Overview module.
procurement_user	financial_mgmt_user, model_manager	Can create purchase orders without a request. Can view requests and requested items. Can view transfer orders. Can create a purchase order or transfer order when sourcing items for a

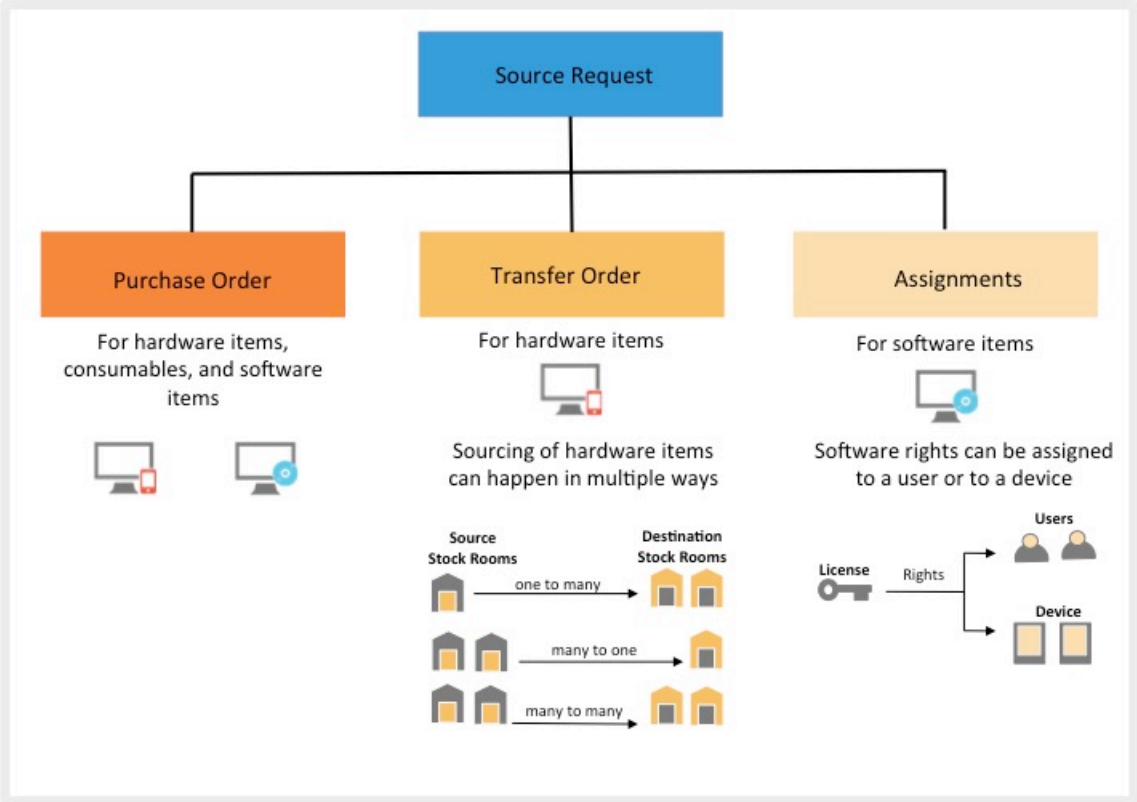
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role	Contains roles	Description
		request. Can view the vendor catalog. Can view and refresh gauges in the Procurement Overview module.

Sourcing items in a service catalog request

A service catalog request can contain multiple items that must be sourced.

Methods of sourcing requested items



Note: Only items with an assigned model can be sourced. You can't source bundles.

Sourcing requested items from local stockrooms

You can use the assets available in the requester's local stockroom to fulfill a service catalog request. The assets that are in stock are reserved and a fulfillment task is created to source and fulfill the request.

Sourcing requested items from other stockrooms

When the requested items aren't in stock, you can create a purchase order to deliver the items from other source stockrooms to your local stockroom. You can request multiple items in a purchase order.

After creating a purchase order, you can create hardware assets and reserve it for the requester either before or after you receive the requested items. You can't create or assign software licenses to the requester before you receive the software licenses.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sourcing requested hardware items

You can source requested hardware items by creating a transfer order. You can transfer hardware assets from a source stockroom to multiple destination stockrooms.

When a source stockroom doesn't have enough items in stock, you can specify multiple source stockrooms in the transfer order so that the hardware items can be transferred to the destination stockrooms.

Important: If the Field Service Management application is also activated on your ServiceNow instance, then a workflow in this application processes the transfer orders. For more information, see Move an asset through the transfer process.

Sourcing requested software licenses

To source a requested software license, you must assign the rights of the software license to a user or a device so that they're authorized to use the software.

Related topics

- Manage transfer orders
- Track a request from the service catalog
- Models
- Bundled models
- Source requests from local stockrooms

Create a purchase order from a request

You can create a purchase order directly from a request. This approach enables procurement managers to obtain items and fulfill requests from the Service Catalog. You can create multiple purchase orders from a request.

Before you begin

Role required: procurement_admin or procurement_user

About this task

If you don't have the Sourcing and Procurement Operations (SOP) application, you can create a purchase order to obtain items and fulfill requests from the Service Catalog.

If you have the Sourcing and Procurement Operations (SPO) application along with required plugins installed, and the necessary role assigned, you can create a purchase order by accessing the Shopping Hub catalog items.

- Required Plugins:
  - Asset Management Integration for Sourcing and Procurement Operations (com.snc.sn_spend_asset)
  - Sourcing and Purchasing Automation (com.snc.sn_pr)
  - Shopping Hub (com.snc.uib.sn_spend_uib)
- Required Roles: The procurement manager has the asset manager role (sn_spend_asset.spo_shopper) and other roles depending on the IT Asset Management applications.

For more information about the Asset Management Integration for Sourcing and Procurement Operations (com.snc.sn_spend_asset) plugin, see Sourcing and Procurement Operations integration with Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Procurement** > **Requests** > **Requests**.
2. Select the **Number** of a request that has been approved but not sourced.
   Look in the **Request State** and **Sourced** columns.
3. In the **Catalog Tasks** related list, select a Source Request Items number.
4. Select **Source Request**.
   The Source Request screen is displayed with a list of all the requested items.
5. Select **Purchase** in the requested item section.

   Important: If you're using the Sourcing and Procurement Operations (SPO) application, when you select **Purchase**, a validation check runs to verify that the following conditions are met:

   - Required plugins are installed to enable the procurement manager to work on assigned requests by using the SPO's Shopping Hub workflows.
   - The procurement manager has the correct role.

   After successful validation, you're directed to a new Source Request page. The SPO's Shopping Hub workflow guides you through the steps to complete the checkout of the requested items, and you don't need to follow steps 6 through 11 on this page for purchase order creation. Depending on whether the requested items have contractual pricing or not, a purchasing or sourcing flow is triggered, and you need to provide the details for completing the order. For more information about creating sourcing request or purchase requisition, see Create Sourcing Request or Purchase Requisition in SPO via Asset Management Workspace.
6. In the **Vendor** list, select the vendor from which the requested item or items should be delivered.
7. Verify if the **Out of Stock** field is set to **false**.
   If the vendor doesn't have stock, the field value is **true**.
8. In the **Quantity** field, specify the quantity you want to order.
9. In the **Destination Stockroom** list, select the destination to which the requested item or items should be delivered.
10. **Optional:** Select the **Consolidate PO** check box to combine the listed items with existing purchase orders.

    (Optional) When you check Consolidate Purchase Orders, all items sourced from the same vendor on the same request are placed on the same purchase order. When you select a vendor, the system automatically searches for purchase orders that have been created for the same request, have the same **Vendor** selected, and have the **Requested** status. If the system finds a match, all items are placed on the same purchase order and can be ordered together. If the system doesn’t find a match, a new purchase order is created.

    For example, if you’re purchasing 25 phones from Apple and an open purchase order exists for Apple, the 25 phones are added to the open purchase order. If there are no open purchase orders for the selected vendors, new purchase orders are created. Items ordered from the same vendor are grouped. Different items are shown on separate lines on the purchase order.
11. Select **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

- A purchase order is created.
- On the request, the **Sourced** check box is selected

Create a transfer order from a request

You can create a transfer order directly from a request to source hardware items and consumables from stockrooms.

Before you begin

Role required: procurement_admin or procurement_user

Important: If the Field Service Management application is also activated on your ServiceNow instance, then a workflow in this application processes the transfer orders. For more information, see Move an asset through the transfer process.

Procedure

1. View procurement requests.

UI	Action
Core UI	Navigate to **All** > **Procurement** > **Requests** > **Requests**.
Hardware Asset Workspace	**a.** Navigate to **All** > **Hardware Asset Workspace** > **Asset operations**. **b.** In the Procurement list, select **Requests**.

2. Select a request that has been approved but not sourced.
   Check the **Request State** and **Sourced** columns.
3. In the **Catalog Tasks** related list, select a sourcing task.
4. Select **Source Request**.
   The Source Request or Sourcing page appears with a list of all the requested items.
5. Create a transfer order.

UI	Action
Core UI	Select **Add Transfer Order**.
Hardware Asset Workspace	Select **Transfer**.

6. **Optional:** On the Sourcing page of the Hardware Asset Workspace, select the **Source through distribution channel** check box to source the assets from the inbound distribution channels that support the destination stockrooms.

   Note: The **Source through distribution channel** check box that enables you to source through a distribution channel for Transfer orders appears only in the Hardware Asset Workspace. Your preference of selecting or clearing this check box is saved and is shown when you open the Sourcing page again.

   You can associate the location of the requester as a service location with multiple stockrooms for better location coverage. Also, these stockrooms can be associated with multiple inbound stockrooms or distribution channels for optimized transfer of assets between the stockrooms.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Distribution channels enable you to source the assets from the stockrooms that you prefer for sourcing based on the rank that you provide to the stockrooms.

For more information, see Associate a stockroom with service locations and Link stockrooms into a distribution channel.

7. In the **Source stockroom** list, select a stockroom from which the hardware item should be sourced.

   Note: In the Hardware Asset Workspace, the Source stockroom list shows only the inbound distribution channels of the stockrooms that support the location of the requester under the following conditions:

   a. When you've selected the **Source through distribution channel** option.

   b. When the inbound distribution channels are added to the stockrooms that support the location of the requester.

8. In the **Transfer Quantity** field, specify the quantity you want to transfer.
   The **In stock** column, displays the total stock available with the selected source stockroom.
9. In the **Destination stockroom** list, select the destination to which the requested item or items should be delivered.

   Note: In the Hardware Asset Workspace, the Destination stockroom list shows only the stockroom that supports the location of the requester under the following conditions:

   a. When you've selected the **Source through distribution channel** option.

   b. When the location of the requester is added as a service location of one or more stockrooms.

10. Select **Submit**.
    A transfer order is created to move the item or items from the **Source stockroom** location to the **Destination stockroom** location. When you view the request, the **Sourced** check box is selected.

Related topics

Manage transfer orders

Source requests from local stockrooms

Get visibility into local stockrooms at the time of sourcing requests.

Before you begin

You can source a request by using assets from the requester's local stockroom.

- If stock is available in the local stockroom, the asset is reserved and follows the fulfillment task to source the request.
- If the requester's location is supported by another stockroom as part of service locations, the asset can also be sourced from this stockroom.
- If stock in the local stockroom is unavailable, you can get the assets transferred from other stockrooms or create a purchase order.

The Workflow Studio application is used to create the Asset Local Stock subflow to take you through the process of using assets from your local stockroom to source your request. As the

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

subflow takes you through the various stages, the asset details are automatically updated. You can open the Asset Local Stock subflow to view the status of the stages in the subflow.

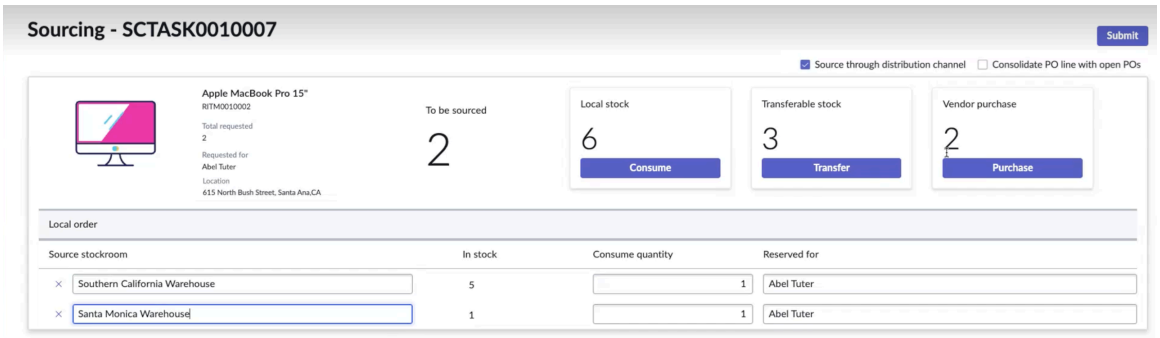
Note: Use decision tables to customize the Asset Local Stock subflow. For more details, see Hardware Asset Management flow customization.

Role required:

- procurement_user or procurement_admin
- inventory_user or inventory_admin
- procurement_system_admin (access to Consume and Close task)

Procedure

1. Log in with credentials for the role of procurement_user or procurement_admin.
2. Navigate to **All** > **Service Catalog** and select **Hardware**.
3. Select the hardware item that you want to source and select **Order Now**
   Your request is submitted and the Order Status form layout appears.
4. Select the request number.
5. On the Request form layout, select the **Catalog Tasks** related list to view the sourcing task for the request.
6. Select the sourcing task and select **Source Request**.



The Sourcing form shows the following hardware sourcing request details:

- **Total requested**- Quantity of the hardware requested.
- **Requested for**- Name of the person for whom the hardware is requested.
- Location- Place where the hardware should be deployed.

Trouble?
If the Source Request functionality or button isn't functioning as expected, confirm that the catalog task has both the **Parent** and **Request** fields populated. For more information, see View and edit a catalog task. The Request ID, which is required for the Source Request page to function correctly is derived from the Parent field of the catalog task. If the Parent field is missing and the catalog task was created using Flow Designer, refer to the relevant Set Parent field when creating Catalog Task from Flow Designer for further details.

7. Select **Consume** to source the available stock from the local stockroom and from the stockroom that supports your location.
   If stock isn't available in your local stockroom and the stockroom that supports your location, select **Transfer** or **Purchase** to source the request via a transfer order or a purchase order. If you create a transfer order and want the local stockroom to

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

be included in the list of stockrooms to choose from, the admin must turn on the `glide.asset.procurement.sourcing.local_stock_transfer` property.

8. Select **Source Stockroom** to select the stockroom from where you want to source the assets. If your location is associated with a stockroom as a service location, you can source from this stockroom along with the local stockroom. Service location capabilities enable a single stockroom to support multiple locations and consume the local stock efficiently. For more information on Service locations, see Associate a stockroom with service locations.

   If the Asset pick task is enabled for the source stockroom, then this task is added to the Hardware Asset Refresh Request and Hardware Asset Request flows.

9. In the **Consume Quantity** field, specify the quantity of assets that you want to consume from the stockroom that you selected.
10. Select **Reserved for** to specify a user for whom you want to source the request.
11. To source from multiple stockrooms, repeat steps 7–9.
12. Select **Submit**.
    A consume asset task is created. Assets are selected from the stockrooms and are reserved for the user who you selected in the **Reserved for** list. The state of the selected asset moves to in stock and the substate to reserved.
13. Log in with credentials for the role of inventory_admin or inventory_user.
14. Select the **Requested Items** related list and then select the request item.
15. Select the **Asset Tasks** related list and then select a task to select and assign an asset to the sourcing task.
    The Consume Asset Task form layout appears in the Asset Tasks module. Based on the type of asset (hardware or consumable) that is being sourced, fields in the form layout differ. The Assets Tasks module lists all the asset task records.
16. Change that you need and then close the task when you're done.
    - For hardware assets: Assets are auto-assigned to sourcing tasks but you can change an asset by selecting the **Asset** list. After you're done, select **Close Task**.
    - For consumable assets: The model for the asset appears on the form layout instead of the asset. Select **Close Task** or **Consume and Close**. If you select **Consume and Close**, the reserved asset is automatically picked up and assigned to the user. If you select **Close Task**, you must go to the Consumable form layout and assign an asset to the user manually.

Add an assignment from a request

You can add assignments directly from a request to source rights from software licenses.

Before you begin

Role required: procurement_admin or procurement_user

Procedure

1. Navigate to **All** > **Procurement** > **Requests** > **Requests**.
2. Select the request that has been approved but not sourced.
   Check the **Request State** and **Sourced** columns.
3. In the **Catalog Tasks** related list, select a number.
4. Select **Source Request**.
5. Select **Add assignments** in the requested software item section.
6. In the **License Name** list, select a license from which the software rights should be sourced.
   The **Available Rights** column, displays the total rights available with the selected license.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. In the **Rights** field, specify the rights you want to assign.
8. From the **Type** list, select whether to assign the rights to a user or device.
9. In the **Assigned\Allocated** list, select the user or device to whom the requested item should be assigned.
10. Select **Submit**.
    An assignment is created to assign rights from the **License Name** location to the **Assigned \Allocated** user or device. When you view the request, the **Sourced** check box is selected.
11. Run the conuter to make sure that you are in compliance.
    You are prompted to run the software counter if the Software Asset Management is active.
12. Select **OK**.
    For auditing, the **Assigned Licences** related list in the Request form will provide the details of all the assignments done as part of this request.

Procurement purchase order management for assets

Accurate purchase order information is important for invoice tracking, receiving, and reporting in the ServiceNow platform.

The Procurement application enables users with an appropriate procurement role to manage purchase order information for assets. It also provides direct access to service catalog requests. You can create purchase orders and transfer orders directly from requests.

Before using the Procurement application, create assignment groups for catalog tasks. Assignment groups are sets of users, filtered by location, who can perform catalog tasks.

Related topics

Manage transfer orders

Create a group

Track a request from the service catalog

The Procurement application lets you track a request that was ordered from the service catalog.

Before you begin

Role required: procurement_admin or procurement_user

About this task

When a user places an order from the service catalog, a request record is created to track the order. Each ordered item becomes a requested item that is listed on the request record. For example, a single request for one laptop, two monitors, and one keyboard creates the following records.

Request REQ0000001: 4 items

- Requested Item RITM0000001: 1 laptop
- Requested Item RITM0000002: 2 monitors
- Requested Item RITM0000003: 1 keyboard

Procedure

1. Navigate to **All** > **Procurement** > **Requests** > **Requests**.
2. Click a request **Number**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The **Requested Items** related list displays the items that were ordered. You can view the requested item, or view associated **Purchase Orders**, **Transfer Orders**, and **Assignments** on other related lists. A catalog task is automatically generated for each requested item to identify the source of the item, whether it must be purchased or transferred from a stockroom.

Cancel a request from the service catalog

You can cancel a request from the service catalog if, for example, the item is no longer needed or the request was not approved.

Before you begin

Role required: catalog_admin, procurement_admin, or procurement_user

About this task

When a service catalog request is canceled, the following actions occur automatically.

- Associated purchase orders that have not been received are canceled.
- All procurement tasks are canceled.
- Associated transfer orders are canceled, if all transfer order lines related to the transfer order are also associated with the service catalog request and the transfer order lines have all been canceled. If the transfer order contains transfer order lines that are not related to the service catalog request and those lines have not been canceled, the transfer order is not canceled.

Associated transfer order lines that are in the **In Transit** or **Delivered** stages are not canceled.

Procedure

1. Navigate to **All** > **Procurement** > **Requests** > **Requests**.
2. Click a request **Number**.
3. Click **Cancel Request**.

View and edit a catalog task

Catalog tasks are used to source items and fulfill requests. You can view and edit catalog tasks from a request.

Before you begin

Role required: procurement_admin or procurement_user

About this task

If a request requires approval, a catalog task is created automatically when the request is approved. If a request doesn't require approval, a catalog task is created automatically when the request is created.

Note: If a request contains one requested item and the item has no model specified, a catalog task isn't created automatically. If a request includes multiple items and only some have a specified model, catalog tasks are automatically created, but only for those items with a model.

Procedure

1. Navigate to **All** > **Procurement** > **Requests** > **Tasks**.
2. Open a catalog task.
3. Edit the fields as necessary.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Catalog task fields

Field	Description
Number	The unique number identifying the catalog task.
Request	The number of the request to which the catalog task is associated. The information in this field is derived from the **Number** field on the Request form.
Request item	The number of the requested item to which the catalog task is associated. The information in this field is derived from the **Number** field on the Requested Item form.
Requested for	The name of the person for whom the associated item was requested. The information in this field is derived from the **Request** or **Request item** field.
Due date	The date by which the catalog task should be completed.
Configuration item	The configuration item associated with the **Request Item**.
Approval	The status of catalog task approval: **Not Yet Requested**, **Requested**, **Approved**, or **Rejected**.
State	The current state of the catalog task: **Pending**, **Open**, **Work in Progress**, **Closed Complete**, **Closed Incomplete**, or **Closed Skipped**.
Assignment group	The group from which an individual is selected to complete the catalog task.
Assigned to	The individual assigned to complete the catalog task is selected from the **Assignment group**.
Work notes list	The list of users to receive email notifications when the work notes on the catalog task are updated.
Short description	A brief description of the catalog task.
Description	A detailed description of the catalog task.
Work notes	Information about how the catalog task is resolved.
Parent	The parent record associated with the task.
Additional comments	Additional information about the catalog task.

4. Select **Update**.

Related topics

Models

Create a purchase order

You can create a purchase order. Purchase orders specify assets to order from a single vendor.

Before you begin

Role required: procurement_admin or procurement_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

For example, an organization can create a purchase order to buy 20 laptop computers or 10 servers. Information on a purchase order enables physical and financial tracking of the assets that were ordered.

You can also use a transfer order if an asset is already owned by an organization. A transfer order is used to internally transfer assets from one stockroom to another instead of purchasing the assets. For example, a company stockroom in New York has five laptops that are needed in Boston. You create a transfer order to move the laptops from the New York stockroom to the Boston stockroom.

After you create a purchase order, the **Receiving Slip** related list is available on the Purchase Order form. A receiving slip is created manually or automatically when the item is received. The **Receiving Slip** related list shows all receiving slips related to the purchase order. After a receiving slip is added to a purchase order, all fields on the purchase order record become read-only.

Procedure

1. Navigate to **All** > **Procurement** > **Orders** > **Purchase Orders**.
2. Click **New**.
3. Complete the form.

Purchase order fields

Field	Description
Number	The unique number identifying the purchase order.
Due by	The date by which the purchase order **Total cost** must be paid.
Vendor	The supplier to which the purchase order was issued.
Ship to	The stockroom to which the items on the purchase order should be shipped. **Note:** This field is required but doesn't affect creating requisitions for software on Coupa.
PO date	The date on which the purchase order was created.
Status	The status of the purchase order: **Canceled**, **Ordered**, **Received**, **Requested**, or **Suspended**.
Assigned to	The user to whom the purchase order is assigned.
Bill to	The location responsible for paying the purchase order **Total cost**.
Short description	A brief description of the purchase order.
General section	
Shipping	The delivery method to be used when shipping the items on the purchase order.
Terms	The purchase order payment terms: **Credit**, **Net 30 days**, or **Net 90 days**.
Ship rate	The amount that must be paid for the delivery method specified in the **Shipping** field.
Total cost	The sum of all item costs on the purchase order and the shipping costs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Description	A full description of the purchase order contents.
Details section	
Initial request	The record number of the request that requires the items on the purchase order.
Requested by	The user requesting the items on the purchase order. **Note:** The email ID or email address of the user requesting the items on the purchase order must be the same on both Coupa and ServiceNow Procurement application.
Requested	The date the user in the **Requested by** field requested the items on the purchase order.
Ordered	The date and time of clicking the **Order** button on the Purchase Order form.
Expected delivery	The date the items associated with the purchase order are expected to arrive in the stockroom identified in the **Ship to** field. This field can't be edited when the purchase order has a **Status** of **Received** or **Canceled**. (For more information about this field, seePurchase order expected delivery date.)
Received	The date and time at which the purchase order status changed to **Received**.
Contract	The record number of the contract with the vendor from which the items on the purchase order are ordered.
Department	The department responsible for paying for the purchase order.
Budget number	The budget number related with the purchase order.
Vendor account	The vendor account related with the purchase order.

4. Click **Submit**.

What to do next
Add purchase order line items to specify what you are ordering from this vendor.

Related topics
Manage transfer orders

Create a purchase order line item

After you save a new purchase order, you create purchase order line item records to specify the individual items to order.

Before you begin
Role required: procurement_admin or procurement_user

Procedure
1. Navigate to **All** > **Procurement** > **Orders** > **Purchase Orders**.
2. Open a purchase order.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. In the **Purchase order line items** related list, select **New**.
4. Complete the form.

Purchase order line item fields

Field	Description
Number	The unique number identifying the purchase order line item.
Vendor	The supplier from which this product should be ordered.
Product Model	The model of the purchase order line item.
Product Catalog	The product catalog category to which the product model is assigned. For example, **Hardware**, **Software**, or **Supplies**.
Part number	The identification number assigned to the product model.
Metric group	Each metric group has a set of license metrics that are specific to the software publisher. **Note:** If you select only a software model in the Product model field, this field gets displayed on the form.
License metric	License metric for the license group that the software license is counted against when reconciliation is run. The options for license metric change based on the **Metric group** field. **Note:** ○ If you select only a software model in the Product model field, this field gets displayed on the form. ○ If you choose a license metric that isn't available on Coupa, the license metric value is defaulted as **each**.
Request line	The identification number of the requested item record associated with this purchase order line item.
Ordered	The date and time at which this purchase order line item was ordered.
Expected delivery	The date the purchase order line item is expected to arrive in the stockroom identified in the **Ship to** field on the purchase order record. This field is automatically filled with the value in the **Expected delivery** field on the purchase order record. This field can be edited when the purchase order line item has a **Status** of **Requested**. For more information about this field, see Purchase order expected delivery date.
Received	The date and time at which the purchase order line item status was changed to **Received**.
Purchase order	The purchase order record number associated with this purchase order line item.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Rights per license pack	Rights associated with each pack that is purchased for Microsoft Per Core or Microsoft Per Core with CAL licenses.
Number of packs	Number of packs for Microsoft Per Core or Microsoft Per Core with CAL licenses.
Status	The current status of the purchase order line item: **Canceled**, **Ordered**, **Pending Delivery**, **Received**, or **Requested**.
Ordered quantity	The number of product models that were ordered.
Received quantity	The number of product models that were shipped and received. The vendor may have sent multiple shipments. The received quantity can be larger or smaller than the **Ordered** quantity. For example, you may have ordered five laptops but the vendor sent six.
Remaining quantity	The number of product models that still need to be received to fulfill the **Ordered** quantity.
List price	The price at which the item retails, not including discounts. If the system creates the purchase order from the service catalog ordering process, the purchase order line item inherits the list price from the associated vendor catalog item. If the vendor catalog item does not have a list price value and you have not entered a value, this field is automatically populated with the value from the **Cost** field.
Cost	The cost of a single product model, including discounts. If the system creates the purchase order from the service catalog ordering process, the purchase order line item inherits the cost from the associated vendor catalog item **Vendor Price**.
Total cost	The cost of a single product model multiplied by the value specified in **Quantity**.
Non-catalog request	Select this check box to create a requisition for an item that is not present in the product catalog of the organization. **Note:** ○ This field isn't visible on the form if you haven't published a procurement integration profile. For more information, see Integrating with external procurement applications. ○ If you select only a software model in the Product model field, this check box gets displayed on the form. ○ If you select an item in the Product Catalog field, the check box gets automatically unchecked. ○ If you haven't selected any item in the Product Catalog field, this check box is automatically checked, which indicates you're submitting a non-catalog request.
Stock Order	Read only and selected if the related request is using the bulk stock order workflow.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: Appears for all purchase order line items when the Hardware Asset Management application is installed from ServiceNow Store.
Short description	A few words or short phrase describing the purchase order line item.

5. Select **Submit**.
   The purchase order reopens with the line item listed. The purchase order and line item are in **Requested** status.
6. **Optional:** Continue adding purchase order line items for this vendor, as needed.
7. After you initiate the order with the vendor and are ready to show that the order was placed, select **Order**.
   The status of the purchase order and line items change to **Ordered**.

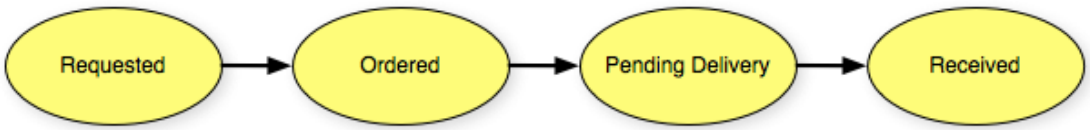
Related topics

Vendor catalog items

Purchase order status

Purchase orders follow a specific life cycle. The **Status** field on the purchase order record is always read-only.

Purchase order status



Status life cycle

Status	Description
Requested	The status is **Requested** when you create a purchase order.
Ordered	The status changes to **Ordered** when you add purchase order line items, and click **Order**.
Pending Delivery	When you create assets before receiving them as a purchase order line item, the status of purchase orders and purchase order line items changes to **Pending Delivery** status.
Received	When ordered assets arrive in the specified stockroom and you click **Receive**, the status of purchase orders and purchase order line items changes to **Received**.
Canceled	You can cancel a purchase order if its status is **Requested**, **Ordered**, or **Pending Delivery**. For more information, see Cancel a purchase order.

Purchase order expected delivery date

The purchase order record and the purchase order line item record both contain the **Expected delivery** date field.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The **Expected delivery** field can be edited on both records. Editing the field on one record can change the field on the other record.

- If you add an expected delivery date to the purchase order and the expected delivery date field on the purchase order line item is blank, the date on the purchase order is added automatically to the purchase order line item.
- If you add an expected delivery date on the purchase order line item and the expected delivery date field on the purchase order is blank, the date on the purchase order line item is added automatically to the purchase order.
- If the purchase order and the purchase order line item have the same expected delivery date and you change the date on the purchase order, the date is changed automatically on the purchase order line item.
- If you change the date on the purchase order line item to a date that is later than the one specified on the purchase order, the date on the purchase order is changed to the new date. The expected delivery date of a purchase order line item cannot be later than the expected delivery date on the associated purchase order.
- If you change the date on the purchase order line item to a date that is earlier than the date specified on the purchase order, the date on the purchase order remains the same.

Cancel a purchase order

You can cancel purchase orders with a status of **Requested**, **Ordered**, or **Pending Delivery**.

Before you begin

Role required: procurement_admin or procurement_user

About this task

Purchase order line items can also be canceled from a purchase order.

Procedure

1. Navigate to **All** > **Procurement** > **Orders** > **Purchase Orders**.
2. Open a purchase order to cancel.
3. Click **Cancel**.
   All associated purchase order line items that have not been received are canceled. Any assets created for the purchase order are deleted.

Cancel a purchase order line item

You can cancel a purchase order line items with a status of **Requested**, **Ordered**, or **Pending Delivery**.

Before you begin

Role required: procurement_admin or procurement_user

About this task

Keep the following in mind when you cancel a purchase order line item.

- When a purchase order line item is canceled, if all other line items are also canceled, the purchase order is canceled.
- After a purchase order line item is canceled, it can be reordered if the associated purchase order has not been canceled or received.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- If you cancel a purchase order line item for which assets were created, the assets are deleted from the system and removed from the purchase order.
- If you reorder the same purchase order line item, the assets are recreated for that line if the line has a status of **Pending Delivery**.

Procedure

1. Navigate to **All** > **Procurement** > **Orders** > **Purchase Orders**.
2. Open a purchase order.
3. In the **Purchase order line items** related list, select a line item to cancel.
4. Click **Cancel**.

Reorder a purchase order

You can reorder a purchase order that was canceled.

Before you begin
Role required: procurement_admin or procurement_user

Procedure

1. Navigate to **All** > **Procurement** > **Orders** > **Purchase Orders**.
2. Open a purchase order with a status of **Canceled**.
3. Click **Order**.
   The status changes to **Ordered** for the purchase order and all associated purchase order line items.

Reorder a purchase order line item

You can reorder a purchase order line item that was canceled.

Before you begin
Role required: procurement_admin or procurement_user

Procedure

1. Navigate to **All** > **Procurement** > **Orders** > **Purchase Orders**.
2. Open a purchase order.
3. In the **Purchase order line items** related list, select a line item with a status of **Canceled**.
4. Click **Order**.
   The purchase order line item **Status** field changes based on the **Status** field of the associated purchase order. For example, if the purchase order has a status of **Pending Delivery**, the purchase order line item status changes to **Pending Delivery** and the assets for the purchase order line item are created automatically.

Create an asset and reserve it for the requester

Create the asset before they're delivered so that you can create the asset record with an asset tag and serial number early in the process and reserve the asset for the user who requested it. The receiver can only select the assets to be received as assets are pre-created.

Before you begin
Role required: procurement_admin or procurement_user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

About this task

Some requests must be approved before items on the request can be sourced. In the base system, requests over $1,000 require approval. To change the $1,000 approval threshold and other workflow attributes, edit the Service Catalog Request workflow.

When the asset state is **In stock**, the **Reserved for** field is maintained as the asset is received and placed in a stockroom. When the asset state changes to **In use**, the **Reserved for** field is relabeled **Assigned to**. If there is a name in the **Reserved for** field, the name is retained when the field is relabeled. A user with the asset role can change the name in the **Assigned to** field. Changing the name is helpful, for example, if an IT technician orders 10 laptops and must assign them to individual users.

Note: If assets are not created prior to delivery, they are automatically created from line items when purchase orders are received. Also you can enter the asset details and receive them when the purchase orders are received.

Procedure

1. Navigate to **All** > **Procurement** > **Requests** > **Tasks**.
2. Open a task with a **State** of **Open** and a **Short description** of **Source Request Items**.
3. Click **Source Request**.
   - If the request is already fulfilled or the items in the request are not sourceable, the **Source Request** button is hidden.
   - If the requested item does not have an assigned model, the item is not listed on the Source the Request dialog box.
   - Any items on the purchase order that have a remaining quantity of **0** are not listed on the Source the Request dialog box.
4. Select a **Destination Stockroom**.
5. Select the **Create PO** option for one or more listed items.
6. For each item requiring a purchase order, select a **Vendor**.
7. Click **OK**.
8. Navigate to **Procurement** > **Orders** > **Purchase Orders**.
9. Open the purchase order you just created.
   If you created a purchase order for more than one item, multiple purchase orders may have been created.
10. Select **Order**.
    After the items are ordered, no additional purchase order line items can be added to the purchase order.
    The status of all purchase order line items changes to **Ordered**.
11. Click the **Create hardware assets prior to delivery** related link to automatically create hardware assets for all purchase order line items.
    Hardware assets are listed in the **Assets** related list. Click an asset in the list to view the asset record. Except for consumables, the **Reserved for** field contains the name of the user who made the original request.

    You can also create assets for individual purchase order line items. On a purchase order, go to the **Purchase order line items** related list and click a specific purchase order line item number. Then, click the **Create hardware assets prior to delivery** related link. Only the hardware assets included on the purchase order line item are created.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Set asset states and substates

Models

Receive assets

Assets can be received and added to the system when they are delivered to a stockroom.

Users with an appropriate procurement role can receive assets. If one purchase order contains multiple purchase order lines, the lines can be received at different times. This is useful if items arrive at the stockroom in different shipments. The purchase order status does not change to **Received** until all purchase order lines are received.

As an alternative to receiving assets when they arrive, you can create assets before they arrive and reserve them for the requester.

Receive an asset

When assets are received and delivered to a stockroom, they're added to the system.

Before you begin

Role required: procurement_admin or procurement_user

About this task

When you receive assets:

- If you haven't pre-created hardware assets, you can enter asset details and reserve them for users.
- You can over receive an order wherein, the received quantity can be higher than the ordered quantity.
- If you have ordered multiple items with different receiving stockrooms, you can receive them at the same time.

Procedure

1. View purchase orders.

UI	Action
Core UI	Navigate to **All** > **Procurement** > **Orders** > **Purchase Orders**.
Hardware Asset Workspace	**a.** Navigate to **Workspaces** > **Hardware Asset Workspace** > **Procurement**. **b.** Select the **Purchase orders** tab.
Enterprise Asset WorkWorkspace	**a.** Navigate to **Workspaces** > **Enterprise Asset Workspace** > **Procurement**. **b.** Select the **Purchase orders** tab.
OT Asset Workspace	**a.** Navigate to **Workspaces** > **OT Asset Workspace** > **Procurement**. **b.** Select the **Purchase orders** tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Select a purchase order with a **Status** of **Ordered** or **Pending Delivery**.
3. Select **Receive**.
   The Receive Purchase Order screen appears with the list of the products ordered.
4. Select the **Received** check box for the line items that you're receiving.
5. To receive software assets:

   a. Edit the **Receiving Stockroom** if the items arrived at a different stockroom than the one specified on the purchase order.

   b. Edit the **Receiving Quantity** if the number of items delivered doesn't match the number ordered.

   c. Edit the **Unit Cost** if the price changed between the time the item was ordered and the time it arrived at the stockroom.
   Enter a number. The number can include decimals.

   d. Select **Capture Asset tags** to enter asset details.
   You can't enter details for assets more than the received rights.

   e. In the **Capture Asset Tag** dialog box, select **Insert a new row**.

   f. Enter the asset tag, serial number, rights, and License key.

6. To receive hardware, consumables, and enterprise assets:

   a. Edit the **Receiving Stockroom** if the items arrived at a different stockroom than the one specified on the purchase order.

   > **Note:** The asset bundle when received creates the asset bundle with the status as **Bundle**. You must add the individual assets under the asset bundle.

   b. Edit the **Receiving Quantity** if the number of items delivered doesn't match the number ordered.

   c. Select the **Reserve** toggle button to reserve the item.
   When a reserved item is received, the **State** and **Substate** fields on the corresponding asset record are automatically set to **In stock** and **Reserved**, respectively. If the **Reserve** button isn't selected for an item, the **State** and **Substate** fields on the corresponding asset record are set to **In stock** and **Available**.

   > **Note:** You can't reserve consumables.

   d. From the **Reserved for** list, select a user you want reserve the asset for.

   If a name was specified in the **Requested for** field on the Purchase order line item form, the name is added automatically but can be changed.

   You can add multiple users in the **Capture Asset tags** dialog box.

   e. Select **Capture asset tags** to enter asset details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can't enter details for assets more than the received quantity. You can also reserve assets for a user.

Note: If you've pre-created the assets, you must select the ones you want to receive.

The **Capture asset tags** dialog box appears with the following fields to be filled in:

- **Asset Tag**
- **Serial number**
- **MAC address**
- **Reserved for**

If you have activated the Enterprise Asset Management or OT Asset Management application, then the **MAC address** field is also displayed.

f. In the **Capture asset tags** dialog box, select **Insert a new row**.

g. Enter the asset details that are required to proceed with receiving the assets.

If the assets that you are receiving belong to model categories linked to a CI class with identification rules defined for fields like the Asset tag, Serial number, or MAC address, you should provide details for at least one of these fields. For example, if identification rules are defined for the Serial number and MAC address, you should provide a value for either of these fields to proceed. The Capture asset tags dialog box will display a message indicating the specific field values you should provide.

The identification rules for a CI class are defined in the CMDB Identification and Reconciliation engine (IRE). For more details, see Identification rules and Create a CI identification rule. These rules help to uniquely identify the asset through these required fields and maintain accurate asset records.

h. From the **Reserved for** list, select the user for whom the item was ordered.
If a name was specified in the **Requested for** field on the Purchase order line item form, the name is added automatically, but you can change it.

i. Edit the **Unit Cost** if the price changed between the time the item was ordered and the time it arrived at the stockroom.
Enter a number. The number can include decimals.

7. Select **Submit**.
A confirmation message displays with the details of assets received.
8. Select **OK**.

A receiving slip is automatically created and can be viewed in the **Receiving Slips** related list. If items on a purchase order are received at different times, a new receiving slip is created each time any item on the purchase order is received. For example, if 30 laptop computers were ordered and arrived in three separate shipments, three receiving slips are created.

Different assets are created for each hardware item. If it's a software asset, one single asset is created for each license if you don't split the rights. For consumables, if an asset exists, it's updated, or else, new assets are created.

Create a receiving slip

Receiving slips are created automatically during the process of receiving assets. You can also create receiving slips manually.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: procurement_admin or procurement_user

About this task
After a receiving slip has been created for a purchase order, all fields on the purchase order record are changed to read-only.

Procedure
1. Navigate to **All** > **Procurement** > **Receiving** > **Receiving Slips**.
2. Click **New**.

   A **Number** is assigned automatically. The current date and time is added automatically to the **Received** field.
3. Select a **Purchase Order**.
   Only purchase orders with a status of **Ordered**, **Pending Delivery**, or **Requested** are listed in the selection window. The **Vendor** column lists the vendor specified on the purchase order. The **Ship to** column lists the destination stockroom specified on the purchase order.
4. Select a **Receiving Stockroom**.
5. Click **Submit**.

What to do next
Add a receiving slip line to the receiving slip to identify the items from the purchase order that were received.

Create a receiving slip line

When assets arrive at a stockroom and you receive them, a receiving slip is created on the purchase order. You create a receiving slip line to identify the specific assets and quantities that were received.

Before you begin
Role required: procurement_admin or procurement_user

About this task
If the asset already exists, the asset record is updated when you save the receiving slip line. If the asset does not already exist, a new hardware or software asset record is created. The **Model category** and **Configuration item** fields are automatically filled in on the new asset record based on information in the request, purchase order, or receiving slip. If **Asset Tag** and **Serial Number** information exists, it is not overwritten.

Procedure
1. Navigate to **All** > **Procurement** > **Receiving** > **Receiving Slips** and open a receiving slip.
2. In the **Receiving Slip Lines** related list, select **New**.
   The following fields are completed automatically.

   - A **Number** is assigned.
   - In **Received**, the current date and time are added.
   - In **Received by**, the currently logged in user is added.
3. In **Purchase Order Line**, select the reference lookup icon and select a purchase order line.
   The **Purchase Order Line** field is required if the parent receiving slip has an associated purchase order. Only purchase order lines that are associated with the same purchase order linked to the parent receiving slip are available for selection.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. In **Quantity**, enter the number of items received.
   For example, five items were ordered, but only two are being received.
5. **Optional:** Edit the **Received by**, **Requested for**, and **Unit cost** fields, as needed.
6. Select **Submit**.

Result
The **Receiving stockroom** field on the Receiving Slip record becomes read-only.

Consumable assets

A consumable asset is one that is purchased in quantity and distributed. It is assigned to the consumable model category, and the asset record tracks the quantity that is available and total cost. When consumable assets are received, they are merged into an existing consumable record, if available.

For records to merge, the consumable can't be listed on an active transfer order. When a record is eligible for merge, the merge process identifies an existing consumable record that matches on all of the following base fields:

- Model
- Location
- Model category
- Stockroom
- Install status
- Substatus
- Parent
- Asset function
- Assigned to
- Domain (for multi-domain instances)
- Active-to (matched as true, or as false-or-empty)
- Planned-for-disposal (matched as false or empty)

When consumables are merged into an existing record, the cost of the additional consumables is added to the current record. For example, if 50 computer keyboards arrive and 20 keyboards of the same model exists in the receiving stockroom, the two records are merged showing 70 keyboards in the stockroom with a combined total cost.

If no matching consumable record exists in the receiving stockroom, a record is created. After the consumables are received, the quantity is updated, but individual consumables are no longer tracked within the Procurement application and aren't displayed on receiving slip lines.

Note: The related list of a purchase order doesn't display consumable asset details. This means that you can't track consumables through a purchase order.

For more details on creating consumable assets, see Create consumable assets.

Integrating with external procurement applications

Manage an end-to-end procurement process by integrating external procurement applications with Software Asset Management and create software requisitions directly on the external procurement applications. Software Asset Management tracks these requisitions and

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

automatically generates entitlements or entitlement import errors after these requisitions are received on the external procurement application.

Integrating Software Asset Management with external procurement applications help you to:

- Gain end-to-end visibility of the entire purchase request to entitlement creation.
- Automate the complete process of creating software requisitions to entitlement creation.
- Reduce errors in entitlement creation.

Before you begin

- Activate the Procurement plugin (com.snc.procurement). For more information, see Activate Procurement.
- Install the Asset Management - Procurement Integration (app-itam-procurement-integration) store application from ServiceNow Store. For more information, see Install Asset Management - Procurement Integration.

Install Asset Management - Procurement Integration

You can install the Asset Management - Procurement Integration application (app-itam-procurement-integration) from the ServiceNow Store.

Before you begin

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

Role required: Now Support

After the Asset Management - Procurement Integration has been entitled, you can reach out to Now Support to install this application.

About this task

Scheduled jobs and tables are installed with Asset Management - Procurement Integration:

For more information, see Components installed with Asset Management - Procurement Integration.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Asset Management - Procurement Integration application (app-itam-procurement-integration) 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.

   In a list next to the **Install** button, you see the versions that are available to you.
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.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

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

Components installed with Asset Management - Procurement Integration

Several types of components are installed with activation of the Asset Management - Procurement Integration application, such as tables and scheduled jobs.

Scheduled jobs installed

Scheduled job	Description
ITAM - Sync <procurement_integration_profile_name> purchase orders	Fetches the status of the already created requisitions daily. This scheduled job is automatically created when you publish the integration profile.

Tables installed

Table	Description
Procurement Integration Profile [itam_procurement_integration_profile]	Includes the details of the third-party procurement integrations that are connected to the Procurement application in ServiceNow.
Procurement Integration Jobs [itam_procurement_integration_job]	Includes the mapping information of a procurement integration profile with its associated scheduled jobs.
Integration Scheduled Job Results [itam_procurement_integration_job_log]	Includes the details of the failure of the scheduled job execution.

Domain separation and Asset Management - Procurement Integration

Domain separation is supported for Asset Management - Procurement Integration. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Enhanced

- Includes **Basic** and **Standard** levels.
- Data-driven process enables service provider customers to modify business logic that is based on defined use cases. These configurations are UI-based and fail-safe so that configurations by one customer can’t affect another.
- Tenants of the instance must be able to configure minimum viable product (MVP) business logic and data parameters for themselves. This logic and parameters would be expected for the application's normal function.

Sample use case: Tenant-customers of a shared environment must be able to change the impact, urgency, or priority matrix to set priority within their domain.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For more information on support levels, see Application support for domain separation.

Asset Management - Procurement integration overview

Domain separation is present in all aspects of the Asset Management - Procurement Integration application.

How domain separation works in Asset Management - Procurement Integration

- You can create multiple procurement integration profiles in each domain. You must have only one published and active profile in each domain, including the parent domain.
- For the Purchase Order to create a requisition in your external purchasing application, a published procurement integration profile must exist in the domain of the purchase order.
- All Purchase Orders, Purchase Order Lines, Receiving Slips, Receiving Slip Lines, entitlements, entitlement import errors, and expense line records that you created are stamped with the respective domain of the purchase order.

The Procurement Integration Job [itam_procurement_integration_job] table isn't domain separated.

However, each procurement integration job is associated with a procurement integration profile. The job execution only synchronizes the updates from the external purchasing application to the purchase orders that are stamped with the corresponding procurement integration profile.

Domain separated tables

- Procurement Integration Profile [itam_procurement_integration_profile]
- Procurement Integration Job Log [itam_procurement_integration_job_log]

Required plugins

- Domain separation extension (com.glide.domain.msp_extensions.installer)
- SAMP (com.sn_samp_master)
- Procurement (com.snc.procurement)

Other supported plugins

Service Catalog – Domain Separation (com.glideapp.servicecatalog.domain_separation)

Integrating with Coupa

Integrating Coupa with Software Asset Management helps you create software requisitions directly on Coupa. Software Asset Management tracks these requisitions and automatically generates entitlements or entitlement import errors after these requisitions are received on Coupa.

Note: This integration doesn't pull requisitions created on Coupa to Software Asset Management.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

- Install the Asset Management - Procurement Integration (app-itam-procurement-integration) store application from ServiceNow Store. For more information, see Install Asset Management - Procurement Integration.
- You must have the Software Asset Management Enterprise license.
- Activate the Coupa spoke. For more information, see Coupa Spoke.
- Activate the Procurement plugin (com.snc.procurement). For more information, see Activate Procurement.

Synchronize reference data

Both ServiceNow Procurement and Coupa have theirs own set of tables and reference data types. For a smooth and successful integration, you must synchronize the data you would refer. For more information, see Reference data synchronization.

Warning: If you don't synchronize data, you might encounter a few issues while creating a requisition on Coupa.

Create a Coupa integration profile

Create a Coupa integration profile to verify the status of the procurement-scheduled jobs, entitlements, and entitlement import errors created through this profile.

Before you begin

Role required: sam_admin

Create an OAuth 2.0 connection with Coupa to get the Client ID and Client Secret. For more information, see OAuth 2.0 Getting Started with Coupa API. Save the Client ID and Client Secret in a secure location for later use.

You must set the following scopes while creating an OAuth 2.0 connection with Coupa.

- core.approval.configuration.read
- core.approval.read
- core.approval.write
- core.catalog.read
- core.common.read
- core.contract.read
- core.contract.write
- core.inventory.adjustment.read
- core.inventory.adjustment.write
- core.inventory.asn.read
- core.inventory.common.write
- core.inventory.consumption.read
- core.inventory.consumption.write
- core.inventory.receiving.read
- core.inventory.receiving.write
- core.inventory.return_to_supplier.read

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- core.inventory.transfer.read
- core.inventory.transfer.write
- core.invoice.delete
- core.invoice.read
- core.invoice.write
- core.item.read
- core.item.write
- core.legal_entity.read
- core.purchase_order.read
- core.purchase_order.write
- core.requisition.read
- core.requisition.write
- core.sourcing.pending_supplier.read
- core.sourcing.pending_supplier.write
- core.sourcing.read
- core.sourcing.response.award.write
- core.sourcing.response.read
- core.sourcing.response.write
- core.sourcing.write
- core.supplier.read
- core.supplier.write
- core.user.read
- core.user.write

Note: If these scopes aren't associated with the Client ID and Client Secret, the OAuth token flow fails on ServiceNow.

Procedure

1. Navigate to **Software Asset Workspace** > **License operations** > **Purchasing** > **Procurement integrations**.
2. Select **New**.
3. On the form, fill in the fields.

Create New Procurement Integration Profile

Field	Description
Display name	Name of the procurement integration profile. For example, `Coupa integration`.
Connection & Credentials	Connection and credential alias for Coupa. This field gets automatically populated to **sn_coupa_spoke.Coupa_OAuth**.
Profile type	Type of integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Select **Coupa integration**.
Status	Status of the integration profile. ○ If you haven't published the integration profile, this field is automatically set to Draft. ○ If you've already published the integration profile, this field is automatically set to Published.
Active	This field is visible and set to true only when the integration profile is published. If you set this field to false, the associated requisitions with this integration profile aren't created and tracked.

4. Select **Save**.
5. Select the Preview icon ⓘ next to the Connection & Credentials field.
   You get redirected to the Connection & Credential Aliases form.
6. Select **Create New Connection & Credential** in the Related Links section to create connection credential.
7. In the dialog box, fill in the fields.

Create Connection and Credential

Field	Description
Name (Connection)	Name to identify the connection uniquely. For example, `Coupa OAuth connnection`.
Connection URL	URL to make a connection to Coupa. Use the `https://<coupa-instance-url>` format. ○ For customer instances, use the `https://{organization_name}.coupahost.com` format. ○ For partner and demo instances, use the `https://{organization_name}.coupacloud.com` format.
Name (Credential)	Name to identify the credential uniquely. For example, `Coupa OAuth credential`.
Token URL	URL used to generate OAuth token. Use the `https://<coupa-instance-url>/oauth2/token` format.
OAuth Client ID	Identifier (Client ID) generated in Coupa.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
OAuth Client Secret	Secret (Client Secret) generated in Coupa.

8. Select **Create and Get OAuth Token**.
   Your ServiceNow instance creates an OAuth for Coupa and then automatically returns you to the Integration Profile form.
9. **Optional:** Create a child alias that can uniquely identify the connection and credentials for this integration profile.
   The first Coupa integration profile that you create uses the default (parent) connection and credential alias for Coupa. Each additional Coupa integration profile that you create needs a unique child alias that helps differentiate the connection and credentials between each integration profile.

   a. On the Connection & Credential Aliases form, select the link under **Child Aliases > Parentalias=*** ** to add child aliases.

   b. Select **New**.

   c. Enter a name for the child alias in the Name field.

   d. Right-click the form header and then select **Save**.

   e. After the form reloads, select the **Create New Connection & Credential** related link.

   f. Repeat steps 7 and 8.

   g. In the Connection & Credential field of the Integration Profile form, select the lookup icon to locate and select the child alias that you created.
   Selecting the child alias associates the alias with the integration profile. Your ServiceNow instance uses this alias to identify the connection and credentials for this integration profile.

10. Select **Publish**.

Result

After you publish the integration profile, the scheduled job *`ITAM - Sync Coupa purchase orders`* runs daily and fetches the status of the already created requisitions.

Note: If you haven't created any requisition, the scheduled job doesn't run.

You can view this information by clicking the **Procurement Integration Jobs** tab.

What to do next

Verify if the scheduled job *`ITAM - Sync Coupa purchase orders`* has run successfully by selecting the **Integration Scheduled Job Results** tab. If the job has failed, you can view the list of errors by following these steps:

1. On the Procurement integration profile form, select the **Procurement Integration Job Log** related list.
2. Open the job log record where the displayed status shows as failed.
3. Select the related list **Asset Job Log Details** to find out the reason for the job failure.

Create software requisitions directly on Coupa through the ServiceNow Procurement application to purchase software.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you want to delete the Coupa integration profile, see Deleting an external procurement application integration profile.

Create a requisition on Coupa through Procurement application

Create software requisitions directly on Coupa through the ServiceNow Procurement application to purchase software.

Before you begin

To create a requisition on Coupa through ServiceNow Procurement application, you must perform the following tasks.

- Create and publish a Coupa integration profile. For more information see, Create a Coupa integration profile.
- Ensure that the Purchase Order you create has at least one Purchase Order Line, and all Purchase Order Lines must be for software products.
- Synchronize reference data types on both ServiceNow Procurement and Coupa applications. For more information, see Reference data synchronization.

If all these conditions are met, you can create a requisition in Coupa.

If the conditions aren't met, requisitions aren't created on Coupa, and the legacy procurement flow continues on the Procurement application.

Role required: sam_admin and procurement_integrator

Note: The procurement_integrator role is added to the sam_admin role. The procurement_integrator role enables the SAM admin to view the connections and aliases.

About this task

You can create a requisition on Coupa through the following ways:

- When a user requests software through Service Catalog. For more information, see Request a catalog item from Service Portal.
- If a procurement_user or sam_admin directly creates a Purchase Order on the Procurement application. For more information, see Create a Purchase Order.
- When a sam_user creates a Purchase Order directly from the Remediation Options form. For more information, see View software model results.

Requisitions are of the following types:

- **Catalog request**: A requisition created for an item that is already present in the external purchasing application.
- **Non catalog request**: A requisition created for an item that isn't present in the product catalog of the organization.

For more information about creating a Purchase Order, see Create a purchase order.

Procedure

1. Navigate to **All** > **Procurement** > **Orders** > **Purchase Orders**.
2. Select **New**.
3. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Purchase order fields

Field	Description
Number	The unique number identifying the purchase order.
Due by	The date by which the purchase order **Total cost** must be paid.
Vendor	The supplier to which the purchase order was issued.
Ship to	The stockroom to which the items on the purchase order should be shipped. **Note:** This field is required but doesn't affect creating requisitions for software on Coupa.
PO date	The date on which the purchase order was created.
Status	The status of the purchase order: **Canceled**, **Ordered**, **Received**, **Requested**, or **Suspended**.
Assigned to	The user to whom the purchase order is assigned.
Bill to	The location responsible for paying the purchase order **Total cost**.
Short description	A brief description of the purchase order.
General section	
Shipping	The delivery method to be used when shipping the items on the purchase order.
Terms	The purchase order payment terms: **Credit**, **Net 30 days**, or **Net 90 days**.
Ship rate	The amount that must be paid for the delivery method specified in the **Shipping** field.
Total cost	The sum of all item costs on the purchase order and the shipping costs.
Description	A full description of the purchase order contents.
Details section	
Initial request	The record number of the request that requires the items on the purchase order.
Requested by	The user requesting the items on the purchase order. **Note:** The email ID or email address of the user requesting the items on the purchase order must be the same on both Coupa and ServiceNow Procurement application.
Requested	The date the user in the **Requested by** field requested the items on the purchase order.
Ordered	The date and time of clicking the **Order** button on the Purchase Order form.
Expected delivery	The date the items associated with the purchase order are expected to arrive in the stockroom identified in the **Ship to** field. This field can't be edited when the purchase order has a **Status** of **Received** or **Canceled**. (For more information about this field, seePurchase order expected delivery date.)

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Received	The date and time at which the purchase order status changed to **Received**.
Contract	The record number of the contract with the vendor from which the items on the purchase order are ordered.
Department	The department responsible for paying for the purchase order.
Budget number	The budget number related with the purchase order.
Vendor account	The vendor account related with the purchase order.

4. Right-click on the form and select **Save**.
   You can add purchase order line items to specify what you are ordering from this vendor. For more information about creating a purchase order line item, see Create a purchase order line item. A requisition line is created with a unique ID in Coupa.
5. After you've added at least one purchase order line item, select **Order**.
   A requisition ID is displayed on your Purchase Order and the corresponding requisition line IDs are displayed on your Purchase Order Lines.

   Note: Wait for some time and then reload the Purchase Order form to view the generated IDs or errors.

Result

After the status of the Purchase Order is **Received** on Coupa, the following activities occur:

- **Assets** and **Receiving Slips** get created and you can find the **Purchase Order Number** on the Purchase Order form.
- The Asset Management - Procurement Integration application automatically generates entitlements.
- On receipt of the assets, the scheduled job *ITAM - Sync Coupa purchase orders* creates a Receiving Slip and Receiving Slip Lines on the ServiceNow Procurement application. This job also pulls the Coupa fields such as Manufacturer part number, Status, and Receiving quantity. The values returned from Coupa through the receiving transactions are used to populate the created entitlements. However, if these values are not available from the receiving slips, then the Asset Management - Procurement Integration application uses the values populated in the Purchase Order of the Procurement application.
- If any discrepancy exists on the Purchase Order, Asset Management - Procurement Integration creates entitlement import errors. You can view the errors by selecting the **Entitlement Import Errors** tab under a Purchase Order, Purchase Order Line item, and Receiving Slip line.

Reference data synchronization

For a successful integration of Coupa with Software Asset Management, you must synchronize the following reference data types on both the ServiceNow Procurement application and Coupa.

Requisition or Purchase Order form

Coupa Requisition field	ServiceNow Procurement Purchase Order field	Description
Requested by	Requested by	The email address that is associated with the Requested by record is used

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Requisition or Purchase Order form (continued)

Coupa Requisition field	ServiceNow Procurement Purchase Order field	Description
		to find the corresponding reference record in Coupa.

Requisition Line or Purchase Order Line Item fields

Coupa Requisition Line fields	ServiceNow Procurement Purchase Order Line Item fields	Description
Supplier	Vendor	The supplier or vendor from which the software product should be ordered.
unit-price	Cost	The cost or price of a single product model, including discounts.
Currency	Cost	Currency is a reference field on Coupa. For a successful integration, verify that the currency codes on Coupa and ServiceNow match.
Item	Catalog Item	The Coupa items and ServiceNow Procurement catalog items must share the same display name. **Note:** This field is only used for catalog requests.
Description	Product Model	The model of the purchase order line item. **Note:** This field is only used for non-catalog requests.

Deleting an external procurement application integration profile

If you want to stop using an external procurement application for creating software requisitions through Software Asset Management, you can delete the integration profile.

A sam_admin can delete an integration profile by selecting **Delete** on the integration profile record.

When you delete a direct integration profile, all scheduled jobs and the job results associated with the profile gets deleted. The integration profile references are also removed from the Purchase Order records on ServiceNow.

After you delete the integration profile, Software Asset Management doesn't consider any in progress requests. Ensure that all the requests in progress are completed before you delete the integration profile.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Domain separation and Procurement

Domain separation is supported in Procurement processing. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Standard*

The support level is Standard but has some exceptions or special conditions.

- Includes all aspects of **Basic** level support.
- Business logic: The service provider (SP) creates or modifies processes per customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must be able to configure minimum viable product (MVP) business logic and data parameters. This configuration is done per tenant, as expected for the specific application.

Sample use case: An admin must be able to make comments required when a record closes for one tenant, but not for another.

For more information on support levels, see Application support for domain separation.

How domain separation works in Procurement

To create or edit Purchase Orders (POs) or PO line items that distinguish the domain, customers must be working in the proper domain. When adjusting any configuration, you should be in the domain where you're doing the work. Use the domain picker to choose the correct domain to work in.

Related topics

Domain separation for service providers

Product Catalog

The product catalog is a set of information about individual models. Models are specific versions or various configurations of an asset. Asset managers use the product catalog as a centralized repository for model information.

A detailed and well-maintained product catalog can coordinate with service catalog, asset, procurement, request, contract, and vendor information.

Models published to the product catalog are automatically published to the Service Catalog. The service catalog includes information about goods (models) and services. If the model is available from multiple vendors, a model can be listed more than once. Models are included with the Asset Management application.

Keep the following in mind when working with the product catalog.

- A product catalog item can be linked to multiple vendor catalog items or to a single model.
- A model can only have one product catalog item.
- A vendor catalog item can only have a single product catalog item.

Related topics

Asset and CI management

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Components installed with Product Catalog

The following components are installed with the Product Catalog plugin.

Demo data is available with the product catalog. The demo data provides various models, model categories, product catalog items, vendor catalog items, and vendors.

Tables installed with Product Catalog

Product Catalog plugin adds the following tables.

Table	Description
Hardware Catalog [pc_hardware_cat_item]	Stores all hardware catalog items that have been published from the Product Model [cmdb_model] base table. Extends the Product Catalog Item [pc_product_cat_item] table.
Product Catalog Item [pc_product_cat_item]	Stores all information for the product catalog. This table extends the Catalog Item [sc_cat_item] table.
Software Catalog [pc_software_cat_item]	Stores all software catalog items that have been published from the Product Model [cmdb_model] base table. Extends the Product Catalog Item [pc_product_cat_item] table.
Vendor Catalog Item [pc_vendor_cat_item]	Stores all vendor catalog item information.

Roles installed with Product Catalog

Product Catalog plugin adds the following roles.

Role	Description	Contains roles
model_manager	Can create CMDB models.	none
category_manager	Can do everything that model managers can do and can administer model categories.	model_manager

Script includes installed with Product Catalog

Product Catalog plugin adds the following script include.

Table	Description
ProductCatalogUtils	Utilities for creating and maintaining product catalog items derived from vendor catalog items and models.

Client scripts installed with Product Catalog

Product Catalog plugin adds the following client script.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Client script	Table	Script contents
Set Model Fields	[pc_vendor_cat_item]	Adds the description and price, if they do not exist, when a vendor catalog item is added to the product catalog.

Business rules installed with Product Catalog

Product Catalog plugin adds the following business rules.

Business rule	Table	Description
Clear model	[pc_product_cat_item]	Clears the link on a model when the link is cleared from the product catalog.
Create child product catalog entries	[cmdb_hardware_product_model]	Creates entries in the product catalog for all items in a bundled model when the bundled model is created.
Sync to Product catalog item	[pc_vendor_cat_item]	Updates the corresponding field in the product catalog when a field is updated.
Sync to Product catalog item	[cmdb_model]	Updates the corresponding field in the product catalog when a field is updated.

Related topics

Business rules

Models

Models are specific versions or various configurations of an asset. Models are used for managing and tracking assets through various ServiceNow platform asset applications, including Product Catalog, Asset Management, and Procurement.

Model definitions can be based on vendor-provided criteria, for example, the manufacturer name Apple MacBook Pro, or on a custom abstraction, for example, Graphic Designer Workstation. All model information is located in the Product Catalog application.

A model can be in one or more model categories. For example, a laptop can be a computer and a server. Model definitions specify whether the model creates an asset, a configuration item, or both. On a hardware model record, compatible hardware models can be added.

Unless otherwise noted, working with product models requires the model_manager role. This role is contained by other roles, such as sam, category_manager, and asset.

Creating models

Models are created in the **Product Catalog** > **Product Model** > **All Models** module.

See Model form fields for a list of the fields that appear on all models, regardless of the type of model.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

Asset Management

Procurement

Model form fields

There are fields on the Model form that apply to all types of models.

Field	Description
Display name	Name of the model. A system property called *glide.cmdb_model.display_name.shorten* controls how software model display names are generated.
Manufacturer	The company that built the model.
Name	The manufacturer-assigned name of the model or abstract name specified by the model manager, such as **Field Agent Laptop**.
Edition	The edition of the software model, such as **Professional**.
Short description	A brief description of the model.
Model categories	The categories to which the model is assigned. This field is a glide list and cannot be used to create reports.
Asset tracking strategy	The process by which the model can be tracked. Choose from the following: • **Leave to Category:** model is transparent and the category defines the asset class. • **Create Consumable Asset:** model forces the asset class to be consumable, regardless of what the category defines as the asset class. • **Don't create assets:** model blocks asset instantiation, regardless of what the category defines as the asset class.
Acquisition method	The method for purchasing the model. Options are **Both**, **Buy**, or **Lease**.
Cost	The cost of a single unit of the model.
Depreciation	The Use depreciation with fixed assets for the model.
Salvage value	The estimated value that an asset realizes upon its sale at the end of its useful life. This value must be less than or equal to the cost of the asset.
Model number	The specific model number assigned to the item by the manufacturer. Setting the system property *glide.cmdb.makeandmodel.use_model_number_lookup* to true enables you to lookup the model number of hardware models through the MakeAndModelJS script.
Barcode	The barcode number assigned to the model. Barcodes are assigned by the manufacturer.
Owner	The person responsible for the model.
Status	The status of the model. Options are **In Production**, **Retired**, and **Sold**.
Expenditure type	The type of expenditure. Choose from the following:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	• **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. • **Opex**: Operational expenditure is an on-going expenditure. For example, toners for the photocopier.
Certified	The option that determines whether the model is approved for use.
Comments	Information about the model that would be helpful for others to know.
Assets	The assets created from this model. This creation can have any combination of assets and configuration items. For example, with a single hardware model you can have assets and no configuration items, configuration items and no assets, or have both.
Configuration Items	The configuration items created from this model. Can have any combination of assets and configuration items.
Product Catalog	The information about the model as it appears in the product catalog and service catalog. Information only appears if the model has been published to the product catalog.

Create hardware models

Use hardware models to track equipment assets such as servers and racks. You can create a new hardware model.

Before you begin

Role required: model_manager

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **Hardware Models**.
2. Click **New**.
3. Complete the form.
   For general field descriptions, see Model form fields. The hardware model fields listed are found in the Information section of the form.

Model form fields for hardware models

Field	Description
Height (U)	The total height of the hardware item, in inches.
Flow Rate (cfm)	The flow rate of the hardware model, expressed in cubic feet per minute.
Sound Power (bels)	The noise measurement, in bels (1 bel=10 decibels).

4. Click **Update**.

Add compatible models to a hardware model

On a hardware model record, you can add compatible hardware models, giving you a good method for tracking hardware assets that can work together.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: model_manager

About this task
Note: Hardware models included in bundled models cannot be added as compatibles.

Procedure
1. Navigate to **All** > **Product Catalog** > **Product Model** > **Hardware Models**.
2. Click a hardware model **Name**.
3. Click **Add Compatible**.
4. Select a compatible model.
5. Click **Submit**.
   The selected model is listed in the **Compatibles** related list.

Related topics
Models

Bundled models

Add substitute models to a hardware model

On a hardware model record, you can add substitutes to track what hardware models can be substituted for another hardware model.

Before you begin
Role required: model_manager

About this task
For example, a 19" monitor can be a valid substitute for a 17" monitor. Note that substitutions are directional so, in this case, a 17" monitor is not a substitution for a 19" monitor. Information about valid substitute models is useful when you select models while creating transfer orders.

When you select substitute models, note the following conditions.

- Substitute models can be used with work management transfer orders. Substitute models are not used in procurement part sourcing.
- Hardware models included in bundled models cannot be added as substitutes.

Procedure
1. Navigate to **All** > **Product Catalog** > **Product Model** > **Hardware Models**.
2. Click a hardware model **Name**.
3. Click **Add Substitution**.
4. In the **Collection** list on the left, double-click a hardware model.
   The hardware model is added to the **List** on the right.
5. Click **Save**.
   The model is listed in the **Substitutes** related list.

Related topics
Models

Bundled models

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Manage transfer orders

Procurement

Create consumable models

Consumables are items that are tracked as a group, not individually. An example of consumable items is computer keyboards.

Before you begin

Role required: model_manager

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **Consumable Models**.
2. Click **New**.
3. Complete the form.
   For general field descriptions, see Model form fields. There are no fields specific to consumable models.
   Any consumable assets you create and assign to the new model are displayed in the **Consumables** related list on the model record.
4. Click **Submit**.

Bundled models

A bundled model is a single model comprised of individual models. For example, a laptop, printer, keyboard, and mouse can be combined into a single bundled model. If you assign any one asset from the bundled model to an individual, that person receives all the components in the bundle.

Bundled model is a template to define the kind of assets that would be a part of asset bundles. To maintain the integrity between asset bundles and bundled models, select the **Bundle assets** check box in the Product Model form layout. Once you select the check box, the status of the bundled model defaults to **Build**. While the status is in build, you can add make changes to the bundled model. Once you change the status to **In Production**, no changes can be made to the bundled model. Now that the bundled model is read-only, you can create asset bundles out of this bundled model. You can change the status of the bundled model back to **Build** only if there are no asset bundles associated with the bundled model.

Note: The **Bundle assets** check box functionality is available only with the Hardware Asset Management licensable application. Hardware Asset Management is available in the ServiceNow Store. To view more information on the asset bundle functionality, see asset bundles.

Bundled models can be abstract or concrete.

Abstract

Permits use of one model in multiple bundles. The abstract bundle is created as a container. One asset in the bundle is specified as the main component. Model categories define which assets can be included in a bundle. Model categories also define what can be the main component of a bundle.

Add a main component to make it easier to track the bundle components. For example, create an abstract bundle adding a computer as the main component and a mouse and keyboard as additional components. When the bundle is assigned to a user, the asset record for the computer shows the computer, mouse, and keyboard all assigned to the user. Abstract bundles are used more often than concrete bundles.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Concrete

Is a fixed bundle where the main component is an asset. Specify the main component and the other components to create an exact bundle. Concrete bundles do not allow for a many-to-many relationship with models.

Keep the following tips in mind when creating and using bundled models.

- Bundles can be nested inside bundles.
- Any type of model can be used in a bundle.
- When a parent link is defined, the fields related to assignment and state of the child assets are read-only. They are populated based on the parent's assignment and state fields.
- If you make a change to the parent bundle, the children in the bundle are affected. For example, if you assign a bundle to an individual, all child asset records show that same individual as the person assigned.
- You cannot pre-allocate bundles.
- In a bundle, consumables are consumed and assets are set to the same state as the main component.
- Only the bundle, not individual components, can be part of a transfer order.
- You control what can go into a bundle through the model category. For example, the model category **Servers** could be set to never allow servers in bundles.
- To create a collection of software, you must create a suite instead of a bundled model.
- A software license cannot be the main component of a bundle.

To create an abstract model, set the model category to **Bundle** and add the components. To create a concrete model, create a model in the **Product Catalog** > **Product Model** > **Bundled Models** module and add components.

Related topics

Consume consumable assets

Create pre-allocated assets

Model categories

Add model components to a bundle

Add model components to a model as needed, for example, when you upgrade a bundle to include additional assets.

Before you begin

Role required: model_manager and asset

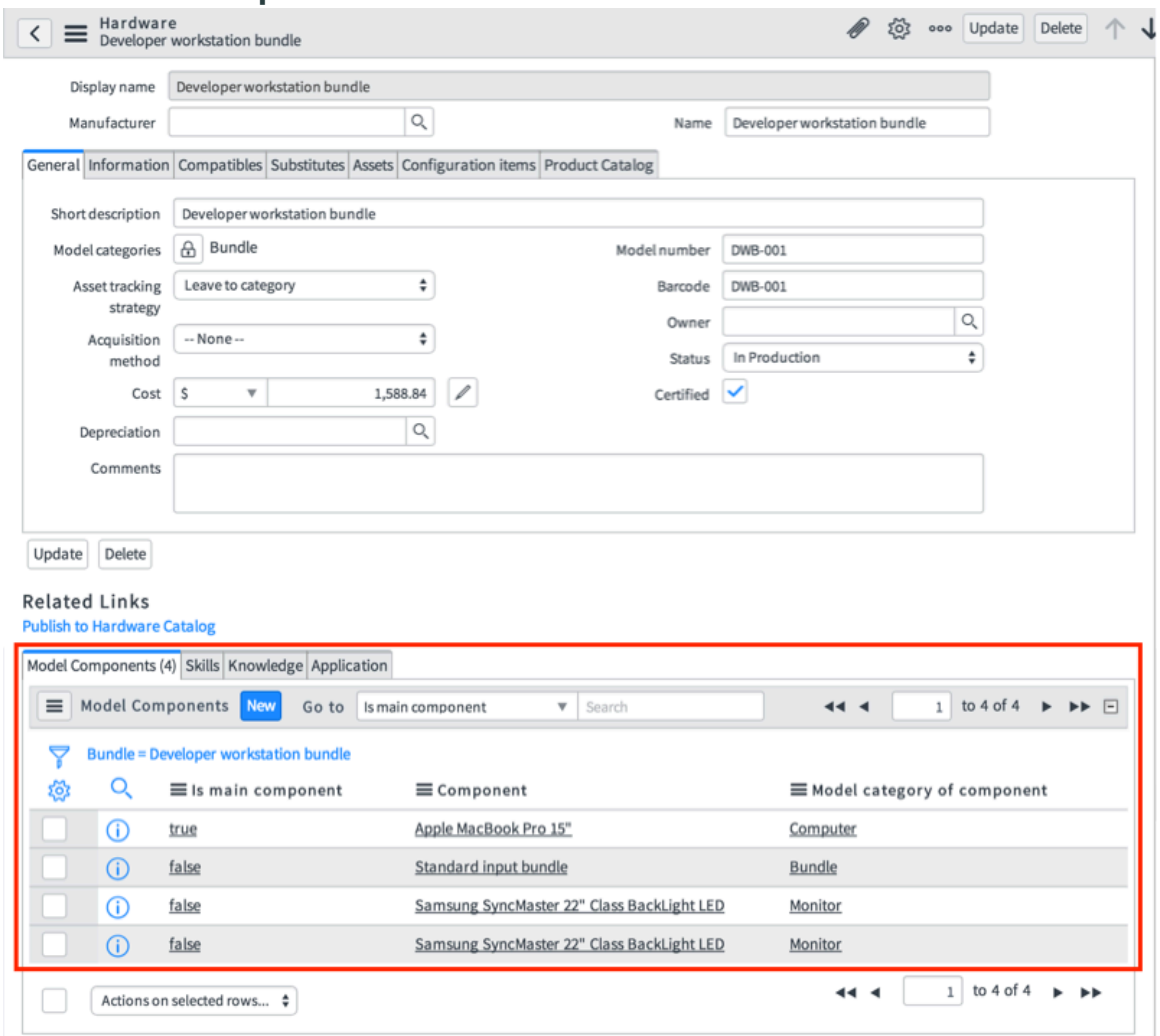
Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **Bundled Models**.
2. Open a bundle record.
3. In the **Model Components** related list, click **New**.
4. Select the **Model category** of the component, such as **Computer**.
5. Select the **Component**, such as **Apple Computer MacBook Pro 17"**.
6. Select the **Is main component** check box if this component is the one that other components are attached to.
7. Click **Submit**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. Repeat steps 3–7 to add more components to the bundle.
   Any components you add to the bundled model are displayed in the **Model Components** related list.

Bundled model components



Related topics

Models

Remove model components from a bundle

Remove a component from a bundled model, for example, when you want to replace it with a different component.

Before you begin

Role required: model_manager

About this task

No component history is retained. If you remove a component from a bundled model, no record is saved showing that the component was ever part of a bundle.

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **Bundled Models**.
2. Open a bundle record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. In the **Model Components** related list, select the component you want to remove.
4. In the **Actions** choice list below the list, select **Delete**.
5. Click **OK**.

Publish bundled models to product catalog

You can publish bundled models to the product catalog to make the bundled models available in the service catalog.

Before you begin
Role required: catalog_admin or catalog_manager

About this task
You can publish a bundled model only under the following conditions:

- The model should be created in the cmdb_model table.
- The model shouldn't have an existing catalog item.

Procedure
1. Navigate to **All** > **Product Catalog** > **Product Models** > **Bundled Models**.
2. Open a product model.
3. In **Related Links**, select **Publish to product catalog**.
4. Select a category.
5. Select **OK**.

Software models

Software models are created as part of the asset management process. You can create product models for software from the product catalog, but you cannot administer all aspects of the software models.

Software models are used in software counters. For more information about creating software model, see Create software models.

Create application models

You can create application models that can be managed and tracked within a Scrum development process.

Before you begin
Role required: model_manager

Procedure
1. Navigate to **All** > **Product Catalog** > **Product Model** > **Application Models**.
2. Click **New**.
3. Complete the form.
   For general field descriptions, see Model form fields. There are no fields specific to application models.
4. Click **Submit**.

Related topics
Agile Development

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Work order models

When work management is activated, the ServiceNow platform adds the Work Order Models and Work Task Models modules to the product catalog.

Users with the wm_admin role can define new model records, which can be used as templates to create work orders for common procedures.

Models created for VMware support and Amazon EC2

When you activate Orchestration for VMware and Amazon EC2, the system creates models automatically.

The system creates the following models:

- A vmware instance for VMware
- An ec2 instance for Amazon

When the virtual machine is terminated, the asset state changes to **Retired**.

Add skills to a model

You can associate skills with any model. Creating associations between skills and models is helpful if you are using work management and want to assign tasks to agents based on their skills with specific models.

Before you begin

Role required: skill_admin or model_manager

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **All Models**.
2. Open a product model.
3. In the **Skills** related list, click **Edit**.
4. Add items from the **Collection** list to the **Skills List**.
5. Click **Save**.

Publish models to the hardware or software catalog

You can publish models to the hardware or software catalog to make the models available in the service catalog.

Before you begin

Role required: catalog_admin

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **All Models**.
2. Open a product model.
   When you publish a catalog item from a model, the property *glide.model.catalog_item_currency* decides the currency on the catalog item. This property is set to false by default and the value is set to user session currency. If you set this property to true, the value is set to model currency.
3. In **Related Links**, click **Publish to Hardware** or **Publish to Software Catalog**.
4. Select a category.
5. Click **OK**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Delete models

If a model is no longer needed, you can delete it as long as no assets or configuration items use the model.

Before you begin

Role required: model_manager

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **All Models**.
2. Select the check box beside the product model.
3. From the **Actions** choice list below the list, select **Delete**.
4. Click **OK**.

Vendor catalog items

The vendor catalog is a list of goods available from different vendors.

An accurate and complete vendor catalog can make it easier to keep items in stock at the best possible price.

You can link multiple vendor catalog items to a single product catalog item, which allows you to track information about a single item at different vendors.

For example, for an iPhone 5 product catalog item, you can create separate vendor catalog items from Apple and from Amazon. Select the vendor with the best price when you source an item. Users need the model_manager role to work with vendor catalog items.

Synchronize information

Certain information is synchronized between models, product catalog items, and vendor catalog items.

When working with models, product catalog items, and vendor catalog items, keep the following in mind:

- Changes to model record update vendor catalog items automatically only if the vendor catalog items are published, not linked.
- If a model is linked to a vendor catalog item, any changes to the model do not update the vendor catalog item.
- After publishing a vendor catalog item or model to the hardware or software catalog, some fields become read-only on the vendor catalog item or product catalog item record. Information can only be updated on the model record.

List of synchronized fields:

- Description
- Short description
- Name
- Product ID
- Price
- Vendor
- Specs
- Features

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Model
- UPC
- Model number
- Cost
- Manufacturer

Create a vendor catalog item

Create a vendor catalog item to associate product models with a vendor.

Before you begin

Role required: model_manager

Procedure

1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Vendor Items**.
2. Click **New**.
3. Complete the form.

Vendor Catalog Item fields

Field	Description
Name	The name of the item is built from information in the **Product Model**, **Vendor**, and **Product ID** fields.
Vendor	The supplier that provides the item.
Product model	The specific version or configuration of the item.
Out of stock	The option that indicates whether the item is unavailable for order. This field is important if you are sourcing request items. Clear this check box if the item is available to order.
Product ID	The item identification number assigned by your organization.
List price	The price at which the item retails, excluding vendor discounts.
Vendor price	The price at which the item is available in the vendor catalog. If the vendor offers a discount, the vendor price reflects the discounted price.
Rank tier	Displays the overall ranking for this vendor's products and services, such as Valued Partner or Tactical Supplier. Rank tier expresses your organization's opinion of this vendor's performance. It can be used to decide if the vendor's products should be promoted or discontinued. Users with the vendor_manager role can edit this field.
Short description	A brief description of the item.
General section	
Product catalog item	Name of the product catalog item, if the item has been added to the product catalog. Leave this field empty if you are going to link a vendor catalog item to the hardware catalog.
UPC	The barcode number used to uniquely identify and track items for sale.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Active	Select the check box to list the item in the vendor catalog. Clear this check box to hide the item in the vendor catalog.
Description	A detailed description of the item.
Information section	
Specifications	Facts about the item such as size, weight, version, or speed.
Features	Distinct properties or distinguishing characteristics of the item.

4. Click **Submit**.

Link an item to the hardware catalog

After you create a vendor catalog item, link the item to the hardware catalog for viewing.

Before you begin
Role required: model_manager

About this task
To see the **Link to Hardware Catalog Item** related link on the Vendor Catalog Item form, add a hardware model or a consumable model to the **Product Model** field, and leave the **Product Catalog Item** field blank.

Procedure
1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Vendor Items**.
2. Open a vendor catalog item.
3. In **Related Links**, click **Link to Hardware Catalog Item**.
4. Select a **Catalog Item**.
5. Click **OK**.
   The page refreshes to the selected hardware catalog item. The vendor catalog item is listed in the **Vendor Catalog Items** related list.

Link an item to the software catalog

After you create a vendor catalog item, link the item to the software catalog for viewing.

Before you begin
Role required: model_manager

About this task
To see the **Link to Software Catalog Item** related link on the Vendor Catalog Item form, add a software model or a consumable model to the **Product Model** field, and leave the **Product Catalog Item** field blank.

Procedure
1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Vendor Items**.
2. Open a vendor catalog item.
3. In **Related Links**, click **Link to Software Catalog Item**.
4. Select a **Catalog Item**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Click **OK**.
   The page refreshes to the selected software catalog item. The vendor catalog item is listed in the **Vendor Catalog Items** related list.

Publish an item to the hardware catalog

After you create a hardware item for the vendor catalog, publish it to the hardware catalog for viewing. The hardware catalog is a section within the service catalog.

Before you begin
Role required: catalog_admin

About this task
To see the **Publish to Hardware Catalog Item** related link on the Vendor Catalog Item form, add a hardware model or a consumable model to the **Product Model** field, and leave the **Product Catalog Item** field blank.

After you publish a vendor catalog item to the hardware catalog, the **Publish to Hardware Catalog** related link is no longer available. Any changes made on the vendor catalog item record are synchronized with the information in the hardware catalog.

Procedure

1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Vendor Items**.
2. Open a vendor catalog item.
3. In **Related Links**, click **Publish to Hardware Catalog**.
4. Select a **Category**.
5. Select **OK**.
   The published item is listed in the **Vendor catalog Items** related list of the Hardware Catalog form.

Publish an item to the software catalog

After you create a software item for the vendor catalog, publish it to the software catalog for viewing. The software catalog is a section within the service catalog.

Before you begin
Role required: model_manager

About this task
To see the **Publish to Software Catalog Item** related link on the Vendor Catalog Item form, add a software model or a consumable model to the **Product Model** field, and leave the **Product Catalog Item** field blank.

After you publish a vendor catalog item to the software catalog, the **Publish to Software Catalog** related link is no longer available. Any changes made on the vendor catalog item record are synchronized with the information in the software catalog.

Procedure

1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Vendor Items**.
2. Open a vendor catalog item.
3. In **Related Links**, select **Publish to Software Catalog**.
4. Select a **Category**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

5. Select **OK**.
   The published item is listed in the **Vendor catalog Items** related list of the Software Catalog form.

View a vendor list

You can view a list of vendors from the product catalog.

Before you begin
Role required: model_manager

About this task
The list includes every company that has the **Vendor** option selected on its record.

Procedure
1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Vendors**.
2. Click any vendor **Name** for more information.

Product catalog items

Product catalog items are hardware and software that you can track and offer in the service catalog.

The product catalog is an extension of the Service Catalog that contains a list of available Models. Users with the catalog_admin role can create, activate, and deactivate product catalog items.

Create a product catalog item

Create hardware and software product catalog items to include in the product catalog and the service catalog.

Before you begin
Role required: catalog_admin

About this task
You must activate the items separately before they appear in the product catalog or service catalog.

Procedure
1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Hardware & Software Items**.
2. Select **New**.
3. Complete the form.
   Some of the fields listed do not appear until you save the product catalog item.

Product catalog item fields

Field	Description
Name	Name of the item as you want it displayed in the product catalog.
Catalogs	Catalog this item is listed in.
Vendor	Vendor that supplies the item. If the item is purchased from multiple vendors, use the vendor catalog and leave this field empty.

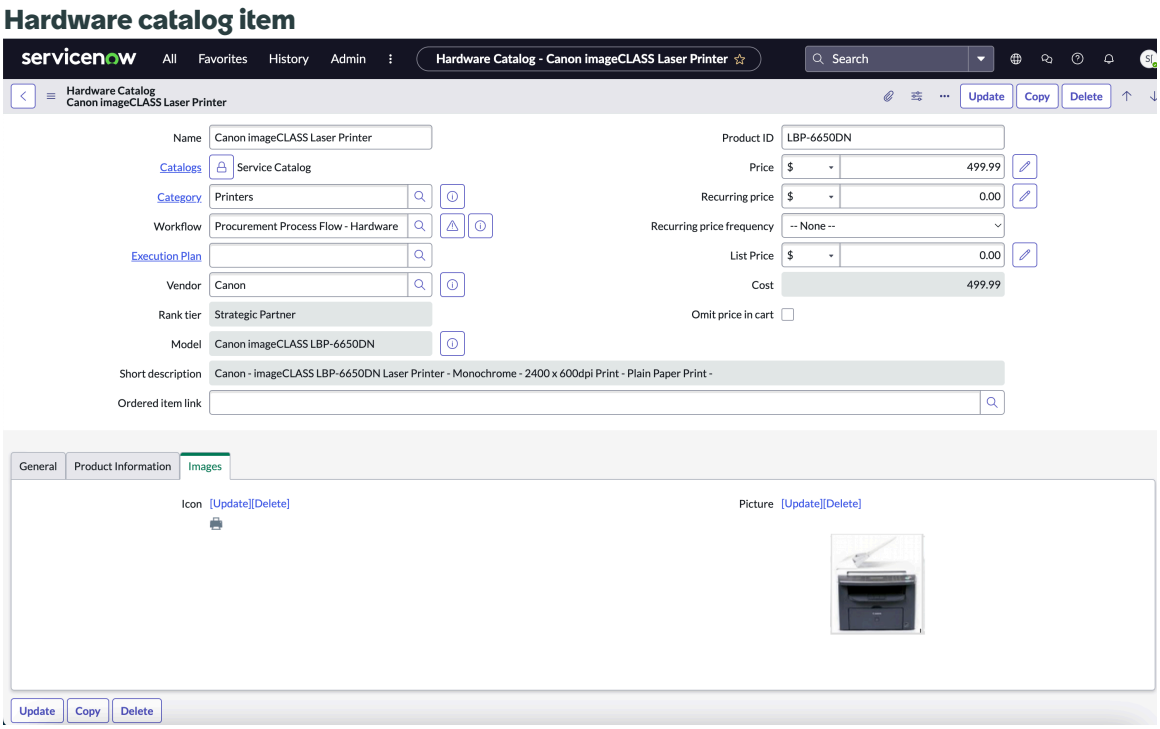
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Rank tier	Overall ranking for the selected vendor's products and services. This field is shown in a Product Catalog Item record when the CI class is **Hardware Catalog** or **Software Catalog**.
Model	Specific version or configuration of the item.
Product ID	Item identification number assigned by your organization.
Price	Price at which the item is available in the product catalog. Enter a numerical value and select the appropriate currency.
Recurring price	Item's recurring price. For example, a subscription to a mobile phone contract could cost $500.00, with an $30.00 monthly recurring price.
Recurring price frequency	Interval at which the recurring price is accrued.
List Price	Price at which the item retails. This field is shown only when the **Class** is **Hardware Catalog** or **Software Catalog**.
Cost	Price at which the item was purchased from the vendor. The cost could be less than the **List Price** if your organization received a discount from the vendor. This field is shown in a product catalog item record only when the CI class is **Hardware Catalog** or **Software Catalog**.
Omit price in cart	When selected, hides the price when the item is displayed in the service catalog. Clear the check box to show the price in the service catalog. This field is only visible in a product catalog item record when the CI class is **Hardware Catalog**.
Workflow	Workflow associated with this item. You can view the activities, the conditions, and the stages associated with the workflow by selecting **Show Workflow**.
Execution plan	Execution plan associated with this item.
Short description	Brief description of the item.
Ordered item link	List of links containing more information about items. The links can be reused across multiple items.
Class	Catalog item class this item belongs to. Select **Hardware Catalog** or **Software Catalog**. This field is visible by default. When you save the record as a hardware or software catalog item, the form is retitled Hardware Catalog or Software, respectively.
General section	
Category	Named group of items to which the item belongs.
Delivery time	Amount of time it takes to deliver the item, starting from when it is ordered from the product catalog.
UPC	Barcode number used to identify and track items.
Description	Detailed description of the item. The description is displayed in the product catalog listing.
Product Information section	

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Cost	Price at which the item was purchased from the vendor. This field is only visible when the **Class** is **Software Catalog**.
Specifications	Facts about the item, such as size, weight, version, or speed.
Features	Distinct properties or distinguishing characteristics of the item.
Images section	
Icon	Small image that appears next to the name when the item is displayed in the service catalog. Supported file types are `jpg`, `png`, `bmp`, `gif`, and `jpeg`.
Picture	An image showing the item. Supported file types are `jpg`, `png`, `bmp`, `gif`, and `jpeg`.
Related lists	
Includes	More catalog items provided with this item. This related list is for informational purposes only.
Variables	Service catalog variables associated with this item. A service catalog variable captures and passes on information about choices a customer makes when ordering an item from the service catalog.
Vendor Catalog Items	Vendor catalog items associated with this item. Vendor catalog items allow you to track information about this item by its specifications for each vendor.

Example
Hardware catalog item record with an icon and picture of the item.



4. **Optional:** Select **Try It** to preview the item as it appears in the service catalog.
5. Select **Submit** or **Update**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

- Create a vendor catalog item
- Create an execution plan
- Service catalog variables

Activate a product catalog item

Activate a product catalog item to make it available in the product catalog and the service catalog.

Before you begin
Role required: catalog_admin

About this task
You can activate the item from either the list view or the record.

Procedure

1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Hardware & Software Items**.
2. Complete one of the following actions.

Option	Description
Activate one or more items from the list view	Select the check box next to one or more items in the record list and select **Activate** be low the list.
Activate from the record	Select **Activate** under **Related Links**.

Deactivate a product catalog item

Deactivate a product catalog item to remove it from the product catalog and the service catalog.

Before you begin
Role required: catalog_admin

About this task
You can deactivate the item from either the list view or the record.

Procedure

1. Navigate to **All** > **Product Catalog** > **Catalog Definition** > **Hardware & Software Items**.
2. Complete one of the following steps.

Option	Description
Deactivate from the list view	Select the check box next to one or more items in the record list and click **Deactivate** below the list.
Deactivate from the record	Select **Deactivate** under **Related Links**.

Import a Product Catalog item

Import a hardware and software product catalog item from one ServiceNow instance to another ServiceNow instance to include it in the product catalog.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: admin

About this task
To import hardware or software product catalog items from one ServiceNow instance to another, use the product model and update sets XML file exported from the source ServiceNow instance.

Note: Product model records aren't included in update sets. When you import an update set into the target instance, only the catalog item records are transferred. To avoid validation errors, first import the product model records, and then import the catalog item's update set into the target ServiceNow instance.

Procedure
1. In the source ServiceNow instance, export the hardware or software product model record XML file.

Option	Description
To export hardware product model record XML file	**a.** Navigate to **All** > **Product Catalog** > **Product Models** > **Hardware Models**. **b.** Select the required hardware model name link. **c.** On the hardware model form, select the Additional actions icon and then select **Export XML (This record)**. **d.** Save the exported hardware model XML file on your local system.
To export software product model record XML file	**a.** Navigate to **All** > **Product Catalog** > **Product Models** > **Software Models**. **b.** Select the required software model name link. **c.** On the software model form, select the Additional actions icon and then select **Export XML (This record)**. **d.** Save the exported software model XML file on your local system.

2. In the source ServiceNow instance, perform these steps to export the local update set containing the catalog item.
   a. Navigate to **All** > **System Update Sets** > **Local Update Sets**.
   b. Select the local update set name to open the update set record.
   c. In the Related Links section, select **Export to XML**.
   d. Save the exported update set XML file on your local system.
3. In the target ServiceNow instance, import the hardware or software product model record XML file.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
To import hardware model record XML file	**a.** Navigate to **All** > **Product Catalog** > **Product Models** > **Hardware Models**. **b.** Hover over any column header in the Hardware Models list to display the Column Options icon. **c.** Select Column options icon and then select **Import XML**. **d.** Select **Choose File** and select the hardware model record XML file saved previously in Step 1. **e.** Select **Upload**.
To import software model record XML file	**a.** Navigate to **All** > **Product Catalog** > **Product Models** > **Software Models**. **b.** Hover over any column header in the Software Models list to display the Column Options icon. **c.** Select Column options icon and then select **Import XML**. **d.** Select **Choose File** and select the software model record XML file saved previously in Step 1. **e.** Select **Upload**.

The product model has been successfully imported into the target ServiceNow instance and appears on the models page.

4. In the target ServiceNow instance, perform these steps to import the update set XML file that contains the catalog item.

   a. Navigate to **System Update Sets** > **Retrieved Update Sets**.

   b. In the Related Links section, select **Import Update Set from XML**.

   c. Select **Choose File** and select the update set XML file saved previously in Step 2.

   d. Select **Upload**.
   The imported update set record is available as a retrieved update set with state **Loaded**.

   e. Open the retrieved update set and select **Preview Update Set**.
   Review updates and resolve any errors.

Result

The catalog items are imported into the target ServiceNow instance.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

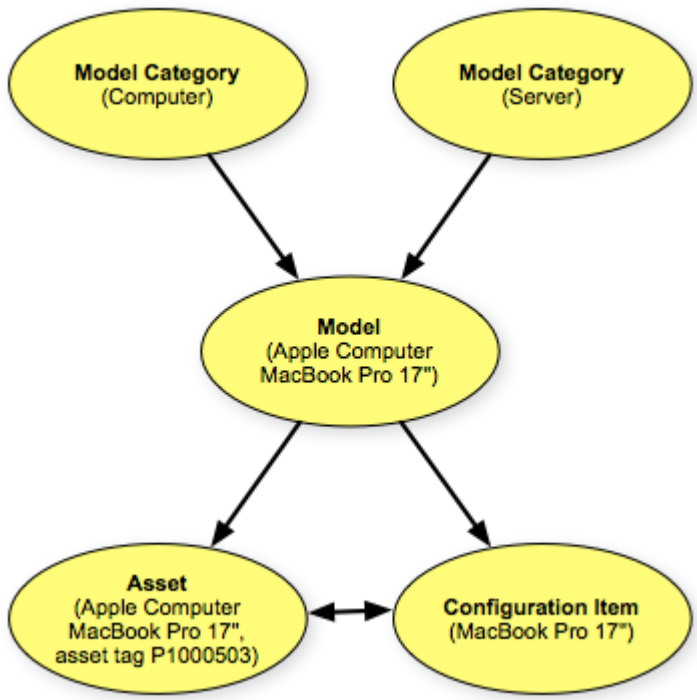
Navigate to the Hardware Models or Software Models page in the target ServiceNow instance, View the imported hardware or software model record, along with its catalog items that are published.

Model categories

Model categories associate CI classes with asset classes. Model categories are part of the Product Catalog application.

The model category configuration determines if the ServiceNow platform creates an asset from a CI, and, if so, what class of asset. Asset classes in the base system are **Hardware**, **Software License**, and **Consumable**. You can associate a model category to many models and a model to many model categories. For example, a specific model of a computer can be a **Computer** and a **Server**.

Models diagram



Any item that is provided as a service or sold to your customer is tracked as an Install Base Item (IBI). The Model category table associates Asset class, CI class, and Install Base Item (IBI) class.

Note: The Install Base Item class field is available on the Model category form only when the Customer Service Install Base Management [com.snc.install_base] plugin is installed. Currently, only the Medical device install base item [sn_hcls_medical_device_install_base_item] is supported when the Healthcare and Life Sciences Service Management Core application is installed. For more details, see Medical device install base item table. When an IBI class is created, it associates with an asset when the asset exists, otherwise an asset is created.

The fields in the Asset class and the IBI class are synchronized as follows:

1. When an IBI class is updated, the Account, Consumer, Location, and Install date field changes are synchronized with the corresponding fields of the Asset class.
2. When an Asset class is updated, the Location and Install date field changes are synchronized with the corresponding fields of the IBI class.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Related topics

CMDB classifications and class dependency

Create an asset class

View model categories

Default model categories are included with product catalog. You can view a list of default categories and the categories that you created.

Before you begin

Role required: model_manager

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **Model Categories**.
2. Open a model category to view its details.

Create model categories

You can add custom model categories for your instance.

Before you begin

Role required: model_manager

About this task

When you create model categories, keep the following in mind:

- The base system provides a model category for each CI class in the CMDB. As you create *cmdb_ci* classes, create a corresponding row in the model category table for the model table to be used.
- If you select an **Asset class** on any existing model category, the system automatically creates assets for all configuration items associated with the model category, if configured to do so. If an asset is not created automatically, you can create the asset manually. After an asset class is selected for a model category, the asset class cannot be changed.
- The **Allow pre-allocated**, **Allow in bundle**, and **Allow as main** options are only available if an asset class is specified for the model category.
- If you select **Consumable** or **Software License** for the asset class, the **Allow in bundle** option is available, but not **Allow pre-allocation** or **Allow as main**.
- When a CI is created from a model category that requires asset tracking, the system automatically creates an asset record for the asset class specified in the model category. It then links that asset record to the CI. If a model is specified, the model category of the CI is determined by a combination of the CI class and the list of categories supported by the model. Asset tracking is specified on the model record.
- When an asset is created from a model category that requires CI tracking, the system automatically creates a CI record of the class specified by the category and links it to the asset.
- The Model Categories list (**Product Catalog** > **Product Model** > **Model Categories**) shows all the CI classes and what asset class is generated on the asset side.

Procedure

1. Navigate to **Product Catalog** > **Product Model** > **Model Categories** and select **New**.
2. On the form, fill in the fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Model Category fields

Field	Description
Name	A descriptive name for this category.
CI class	If a CI class is needed, it must be specified when you create the model category. You can't add the CI class the model category later.
Asset class	Default options and any new asset classes you've created. Setting the asset class triggers the creation of assets depending on the model category selected. You can add an asset class to the model category later, but can't be changed after it's added. If you select **Consumable** or **Software License**, the **CI class** field becomes read-only because consumables and software licenses don't create CIs. If you specify a CI class and then select **Consumable** or **Software License**, the**CI class** field is changed to **None** automatically. ○ Asset: An item that can be tracked individually. ○ Consumable: An asset not tracked individually, such as keyboards. ○ Hardware: A physical piece of computer equipment, such as a laptop or server. ○ Software License: A legal statement defining the uses of software, such as the number of installations allowed or the terms of distribution.
Install base item class	Class to track the asset as an Install base item. **Note:** This field is available only when the Customer Service Install Base Management [com.snc.install_base] plugin is installed. Also, currently, only the Medical device install base item [sn_hcls_medical_device_install_base_item] is available when the Healthcare and Life Sciences Service Management Core application is installed.
Product model class	Class table where the models are stored. The default values are: ○ Application ○ Consumable ○ Contract ○ Facility ○ Hardware ○ Service ○ Software After you select a value, the table content, form views, and overall functionality of the models created in the model category gets impacted.
Is product instance	Identifies whether the model category is associated with Product Instance, which is a logical grouping of asset, CI, and IBI class.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: This check box is read-only and is supported only for Medical device model category. After you select this option, Product Instance Identifier (PID), a unique identifier for asset, CI, and IBI class is generated whenever you create an asset of that model category. However, for the existing assets, the PID is generated only when any of the asset fields such as Serial number, Model component ID, or Parent is updated.
Allow pre-allocation	Add and track items in this category asCreate pre-allocated assets.
Allow in bundle	Use items in this category in bundles.
Allow as main	Use items in this category as the main component in a bundle.
Enforce CI verification	Prevents the system from automatically creating assets in a specific model category when CIs are added manually or found with Discovery. This option enables an administrator to review and verify new CIs before adding them as assets.

3. Select **Submit**.

Related topics

Discovery

Create assets manually

The ServiceNow AI Platform does not create an asset automatically under certain conditions. You can create an asset manually as needed.

Before you begin

Role required: model_manager

About this task

The conditions under which an asset is not automatically created include the following.

- Forced CI verification: If you select the **Enforce CI verification** check box in the **Model Category** form, the system does not create an asset automatically when a CI is created or discovered. When **Enforce CI verification** is enabled, newly created CIs do not trigger an automatic creation of an asset. Instead, these newly created CIs have their **Requires verification** field automatically set to true, which displays the following UI actions for the CI:
  - *`Create Asset`*: Creates an asset and sets *`Requires verification`* to false.
  - *`Merge CI`*: Merges duplicates of a CI. This action is useful if an asset for the CI was created in a separate process, which created an associated CI. Then a second CI was created either manually or via the discovery source - and the duplicate CIs did not properly coalesce.
- Configuration errors: In rare cases, the system can fail to create the asset automatically. This failure can occur if you assign the model and model category to the CI in the wrong sequence.

Follow these steps to create an asset manually.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **Model Categories**.
2. Open a model category that has no assigned CI class.
3. Click **Create Assets**.
   This action creates assets from all CIs deferred for verification in this model category. This option is only available for users with the admin role.

Edit model categories

All default model categories can be edited, except for the Contract model category. You can edit any custom model categories that you created at any time.

Before you begin
Role required: model_manager

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **Model Categories**.
2. Open a model category record.
3. Edit the fields as needed.

   Note: If a CI class is needed, you must specify it when you create the model category. You can't add the CI class to the model category later.

4. Click **Update**.

Delete model categories

If a model category is no longer needed, you can delete it.

Before you begin
Role required: model_manager

About this task
Only model categories that are not referenced by any models can be deleted.

Procedure

1. Navigate to **All** > **Product Catalog** > **Product Model** > **Model Categories**.
2. Select the check box beside the model category **Name**.
3. From the **Actions on Selected Rows** menu below the list, click **Delete**.
4. Click **Delete**.

Domain separation and Product Catalog

Domain separation is supported in the Product Catalog. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Standard

- Includes all aspects of **Basic** level support.
- Application properties are domain-aware as needed.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Business logic: The service provider (SP) creates or modifies processes per customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must configure the minimum viable product (MVP) business logic and data parameters per tenant as expected for the specific application.

Sample use case: An admin must be able to make comments required when a record closes for one tenant, but not for another.

For more information on support levels, see Application support for domain separation.

How domain separation works in Product Catalog

The domain owner's employees and tenants can use the same processes if the work is done in the correct domain. When adjusting any configuration, you should be in the domain where you're doing the work. Use the domain picker to select the correct domain to work in.

Related topics

Domain separation for service providers

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.